Winning Donor Mindshare in the Attention Economy

Maximizing ROI from Multichannel Annual Giving

Advancement Forum

Project Director

Jeff Martin

Contributing Consultants

Haley Gfeller

Jeanine Navarrete, Ph.D.

Hailey Badger

Design Consultant

Kelsey Stoneham

Practice Manager

Katie Stratton Turcotte, M.S.

Managing Director

Liz Rothenberg, Ph.D.

Table of Contents

Top Lessons from the Study

Alumni Attention Scarcer Than Ever

The Era of Shrinking Attention Spans Undermines Annual Giving

The noise our alumni hear has never been louder. They are bombarded with appeals, and they don't know what to do about them. Nonprofits, commercial groups, their undergraduate alma mater, their graduate alma mater—it seems like every organization that they've ever engaged with reaches out constantly for time, attention, and money.

With so many solicitations to sort through, alumni end up allocating their attention much more judiciously than ever before. It takes a lot more to inspire them to act. And even though the number of nonprofits has tripled in the past 30 years, today far fewer organizations end up winning their attention.

Digital Ad Spending Skyrockets
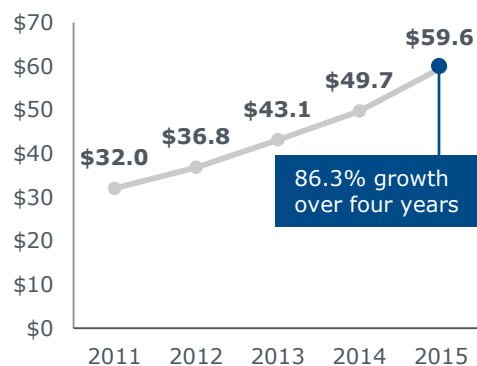
Dollars Spent on Digital Ads (in Billions)

$32.0 (2011) $36.8 (2012) $43.1 (2013) $49.7 (2014) $59.6 (2015)

86.3% growth over four years

Nonprofits Scramble to Be Heard

Frequency of Fundraising Appeals, 2014-2015

	2014	2015
Email at Least Monthly	33%	45%
Direct Mail at Least Quarterly	28%	36%
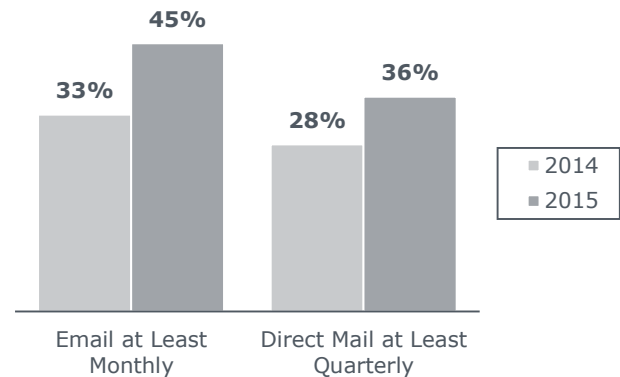
New Rules in a Distracted World

The scarcity of alumni attention has created an "attention economy" that rewrites the rules for engagement and fundraising.

Advancement leaders in this attention economy can no longer rely on appeals to donor loyalty. They must synchronize multiple channels beyond direct mail and phone, craft segmented cases for support, empower ambassadors, and engineer an element of "virality" into their campaigns to capture the interest of an increasingly distracted alumni base.

Key Features of the Attention Economy

Information Overload

Individuals must sort through more information than ever before

Split-Second Decisions

Appeals elicit gut-check responses from busy alumni

Top of the Inbox Wins

Endless emails means focus falls on last organization to reach out

Relevance Is Paramount

People tune out if the content is not meaningful to them

eab.com

Top Lessons from the Study

Alumni Attention Scarcer Than Ever

Persistent Challenges and Long-Term Donor Declines

Colleges and universities have struggled in this new environment. Annual giving strategies remain woefully outdated at many institutions. Our fast-paced digital world has not brought with it much-needed updates to the fundraising playbook.

As a result, appeal effectiveness has declined, and alumni participation rates have continued their nearly three-decade drop. Advancement leaders have watched their alumni shift to "impulse giving" behaviors, yet they continue fundraising as if consistent giving habits ruled the day.

42%
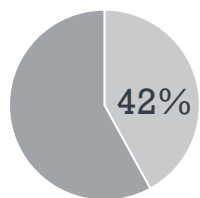
Impulse Givers

A plurality of donors support a constantly shifting roster of nonprofits whenever the mood strikes

" The next generation of donors have different philanthropic behaviors. **They do more one-off giving** than their predecessors. They come, they go."

Maximizing Returns from the Annual Giving Pipeline

The time for change is now. Advancement leaders must take steps to reverse the donor decline. If they don't, they may soon face a depleted major gift pipeline that threatens the long-term sustainability of their institution's fundraising enterprise.

But the donor decline is a complex problem, and one-size-fits-all solutions will inevitably fail. Advancement leaders must approach acquisition and retention in a nuanced, segmented manner.

This study aims to lay a groundwork for three populations: almost-givers who sit on the cusp of donating; interested non-donors and long-lapsed donors who haven't yet received the right appeal at the right time; and skeptical alumni who resist giving back.
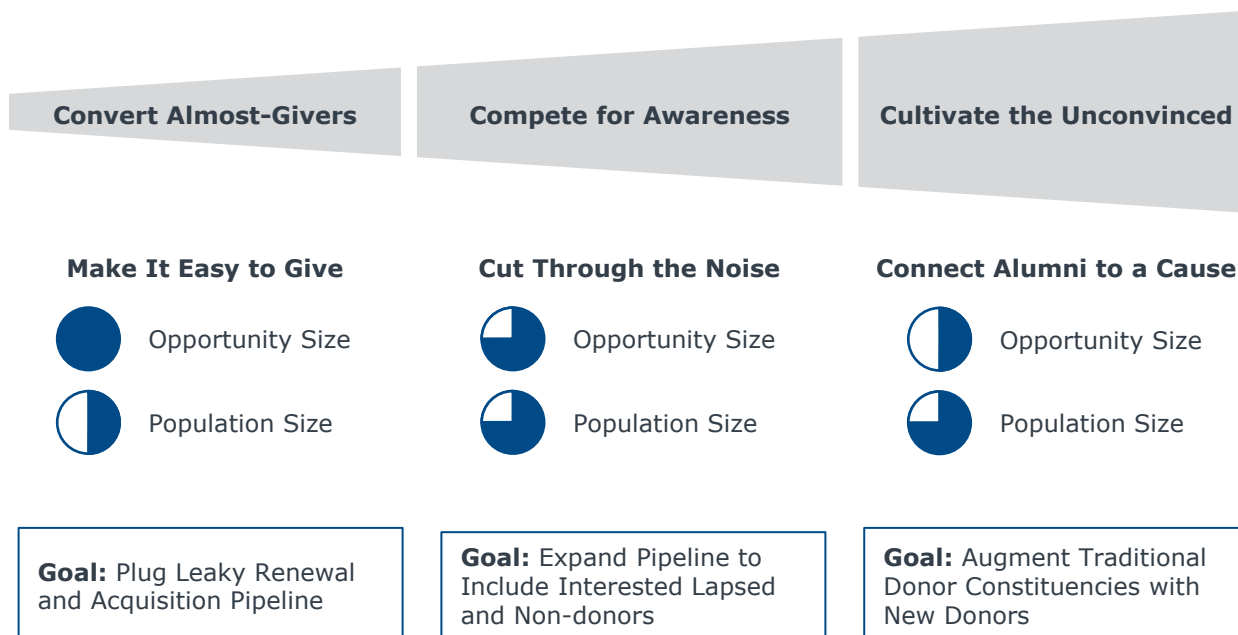
Convert Almost-Givers	**Compete for Awareness**	**Cultivate the Unconvinced**
Make It Easy to Give	**Cut Through the Noise**	**Connect Alumni to a Cause**
Opportunity Size	Opportunity Size	Opportunity Size
Population Size	Population Size	Population Size
Goal: Plug Leaky Renewal and Acquisition Pipeline	**Goal:** Expand Pipeline to Include Interested Lapsed and Non-donors	**Goal:** Augment Traditional Donor Constituencies with New Donors

Source: Herzog PS, Price HE, *American Generosity: Who Gives and Why*, New York: Oxford University Press, 121; Advancement Forum interviews and analysis.

eab.com

The Attention Economy and University Advancement

eab.com

Playing to a Distracted Audience

Demands on Alumni Attention Greater than Ever Before

Stressing Our Ability to Pay Attention

61% Of people feel they have to keep track of information from **too many sources**

45% Say that data overload has affected their **sleep or personal relationships**

44% Solve the problem by **ignoring communications**

October 20
Information Overload Awareness Day

> **All This Means We Need to Work Harder**
>
> "Multi-screening trains consumers to be less effective at filtering out distractions – they are increasingly hungry for something new. This means **more opportunities to hijack attention** but also that brands need to work harder to maintain it."
>
> *Alyson Gausby*
> *Consumer Insights Lead*
> *Microsoft*

Attention spans are under assault, and that has complicated the work of connecting with supporters. Nearly two-thirds of people complain about having too many information sources to keep track of, and half say that data overload causes them undue stress in their personal lives.

Many people have responded to the "noise" in their lives by tuning it out. Many people cope by ignoring communications altogether. For higher education fundraisers looking to engage donors and inspire action through direct response channels, this poses a difficult challenge.

The ubiquity of digital devices contributed to, if not caused, this attention crisis. With glowing screens in every direction offering endless bits of bite-sized entertainment, quiet, meditative concentration has become a rarity.

For many professionals today, the digital causes of the attention crisis matter less than the consequences. Organizations that seek to build connections in the community, be they nonprofits soliciting donations or for-profit companies recruiting customers, must work harder—and smarter—than ever before to win the war for attention.

Flooding the Airwaves with Appeals

Commercial Organizations and Nonprofits Amp Up Outreach

Digital Ad Spending Skyrockets

Dollars Spent on Digital Ads (in Billions)

86.3% growth over four years
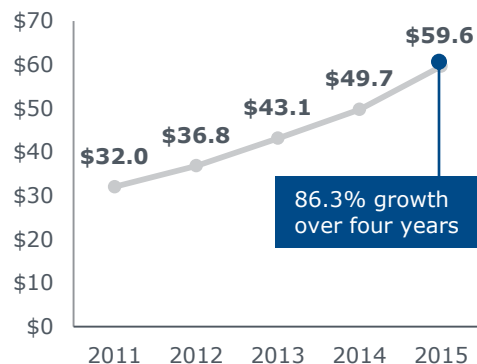
1,324 **Digital ad exposures** per user per day in the United States

Nonprofits Scramble to Be Heard

Frequency of Fundraising Appeals, 2014-2015
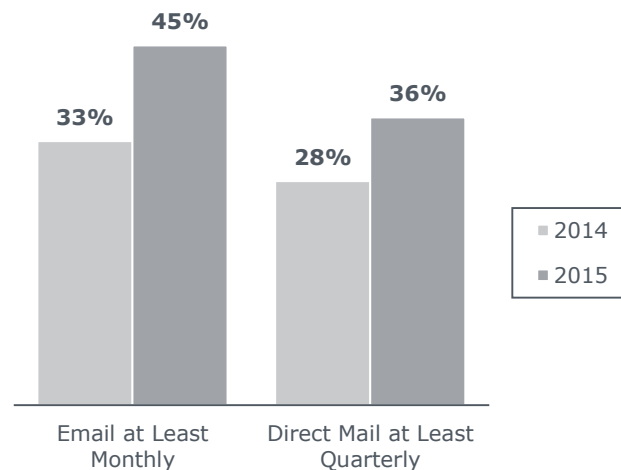
Many organizations have reconciled themselves to our new distracted reality. To adapt, they have radically increased the pace at which they send out solicitations.

In the commercial world, digital ad spending has skyrocketed in recent years. Total dollars spent on digital advertisements nearly doubled during the first half of this decade. By some accounts, the average US internet user sees over 1,300 web ads every day.

Nonprofits, too, have increased the frequency of their fundraising efforts, both through email and direct mail. Most donors today can expect to hear from the organizations they support much more frequently than in the past.

Combined, these factors create an unprecedented level of communications "noise."

Competition Drives Down Donors for All

Crowded Philanthropic Sector Contributes to Fundraising Woes

Unprecedented Growth in the Size of the Sector

Number of Public Charities, 1986-2016

Year	Number
1986	360,000
1996	536,287
2006	873,577
2016	1,097,689
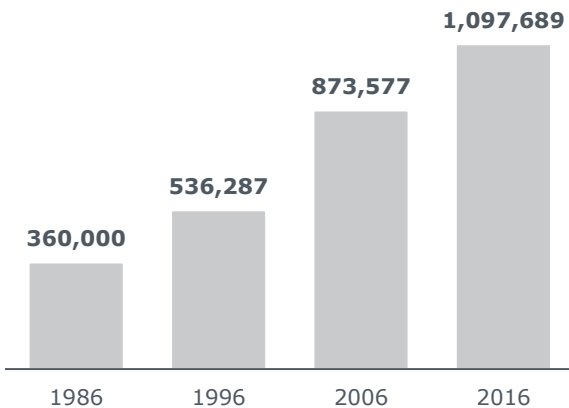
> **More Options, Less Support**
>
> "**The long-term trend continues to move towards giving to fewer causes**, with 42% of the survey's oldest donors supporting 11 or more charities versus only 22% of middle-age donors"
>
> *Penelope Burk*
> *The Burk Donor Survey 2014*

The growing ranks of nonprofits has compounded the "noise" problem. Nonprofits inundate supporters with a constant barrage of appeals, and today there are more of them doing so than ever before. Nearly 1.1 million nonprofits operate in the US today, up from about a third of that total 30 years ago.

At the same time, donors gravitate toward fewer nonprofits. The next generation of supporters seems intent on selecting a handful of organizations each year that appeal to their interests and excluding all others from their philanthropy.

Needless to say, the crowded field and donors' selective giving habits creates intense competition among fundraising organizations to stand out from the pack.

Welcome to the Attention Economy

Fleeting Mindshare Makes It Harder to Win Alumni Donors

WIRED Attention Shoppers!

FORTUNE The Attention Economy and the Implosion of Traditional Media

THE WALL STREET JOURNAL Attention Pays

> " It's beginning to dawn on people who ponder these kinds of things that it's attention, not information, that lies at the heart of the new online world. In a world full of information, the **scarcest commodities are your eyeballs and ears**."

Key Features of the Attention Economy

Information Overload
Individuals must sort through more information than ever before

Split-Second Decisions
Appeals for money or attention elicit gut-check responses from busy consumers

Top of the Inbox Wins
Endless influx of communications means consumers focus on the last organization to reach out

Relevance Is Paramount
Consumers stay tuned in and primed to buy as long as the organization is engaging them with content that is relevant to their lives

Digital oversaturation, near-constant appeals, and the proliferation of nonprofits all contributed to the rise of what many observers have called the "attention economy."

In the attention economy, people have more information to sort through than ever before. As a result, they make quick, and often arbitrary, decisions about where to direct their attention.

In many cases, the organizations that are the most effective at getting in front of people and staying at the top of the inbox win. Visibility is victory.

Yet people learn quickly about where not to pay attention. If an organization is talking about something irrelevant or uninteresting, its audience will tune out remarkably fast.

The Rise of Impulse Giving

Donor Loyalty Declines as Giving Options Grow

Unpredictable

A Shift in Behaviors

"The next generation of donors has different philanthropic behaviors. **They do more one-off giving** than their predecessors. They come, they go. There's been a shift away from doing checkbook philanthropy at the end of the year where you look up what causes you gave to last year and make those same gifts again."

Barbara Turman
Former AVP Annual Giving
Rutgers University

42%

6%

17%

16%

Predictable

Impulse Givers
Support a constantly shifting roster of nonprofits whenever the mood strikes

Habitual Supporters
Make regular donations, but to somewhat random causes

Selective Givers
Give spontaneously, but do so to a fixed set of causes

Philanthropic Planners
Routinely give and deliberately select nonprofits to support[1]

In the fundraising world, the attention economy has contributed to the rise of unpredictable impulse-giving.

In the past, giving followed set patterns. Donors gave to the same organizations annually, and they did so at the same time every year. "Checkbook philanthropy," whereby donors pulled out the carbon copies of their last gifts and wrote checks to the same organizations, meant that nonprofits had fewer donors to win over from other organizations. Donors felt a sense of loyalty, and acted on it at regular, well-timed intervals.

We live today in a different philanthropic reality. Rather than giving to a stable roster of nonprofits, donors contribute to whichever organization, cause, or project inspires them in the moment.

That moment of inspiration is itself fleeting. It can occur at any point during the calendar year. It happens when a donor sees a social media post about a compelling cause, reads a news story about a natural disaster, or chats with a friend who is leading a crowdfunding campaign.

1) Remaining 20% of respondents' survey answers did not place them into any one of the four categories.

Source: Herzog PS, Price HE, *American Generosity: Who Gives and Why*, New York: Oxford University Press, 121; Advancement Forum interviews and analysis.

At Risk of Losing a Generation of Donors?

Fundraisers Must Shift Strategy to Acquire Young Donors

Young Alumni Overtake Older Alumni

Number of People Turning 30 and 50, 2006-2026

4.2M

3.2M

3.8M

4.2M

3.9M

3.7M

3.2M

In 2015, 30-year-olds surpassed 50-year-olds

2006 2008 2010 2012 2014 2016 2018 2020 2022 2024 2026

——— Turning 50   - - - Turning 30

Millennial Attitudes Toward Giving

Preference for Digital Philanthropy

70% Of Millennials say that they give online (versus 34% for mail and 15% for phone)

Attachment to Social Causes

76% Of Millennials believe they can affect change for the social issues they care most about

Desire for Control

46% Of Millennials feel like donations to their alma mater would go into a "black hole"

Our Future Base of Support

" Every nonprofit in the country—universities, whatever—will be **reliant on Millennials within five to 10 years**. They can't be dismissed. They need to be understood."

Scott Mory, Vice President for University Advancement
Carnegie Mellon University

Impulse-giving trends have proved especially prominent among our youngest supporters, who bring a different set of expectations and passions to giving.

The Millennial generation has grown in prominence in recent years. While they were previously a shadow on the philanthropic horizon, demographic shifts have moved Millennials to the forefront of many organizations' fundraising strategies. Indeed, the number of people turning 30 surpassed the number of people turning 50 for the first time in 2015. That shift will persist for years to come thanks to the "Baby Bust" of the last 1960s and early 1970s.

The way Millennials approach giving distinguishes

them from their philanthropic predecessors. They prefer digital channels over direct mail and phone. They care deeply about having an impact on causes that they find meaningful. Most importantly for institutions of higher education, they bring a large degree of skepticism to the prospect of supporting their alma mater. Nearly half believe that gifts to their school would disappear into a budgetary black hole.

Annual giving shops have struggled to adapt to Millennials' preferences. Unfortunately, ignoring them is not an option. Advancement leaders are coming to recognize that future support relies on successful engaging and acquiring young donors today.

Running Just to Stay in Place

Gift Appeals Sent to More Alumni, but Fewer Give Back

25 Years of Participation Declines

Average Alumni Participation Rates (APR), 1975-2015
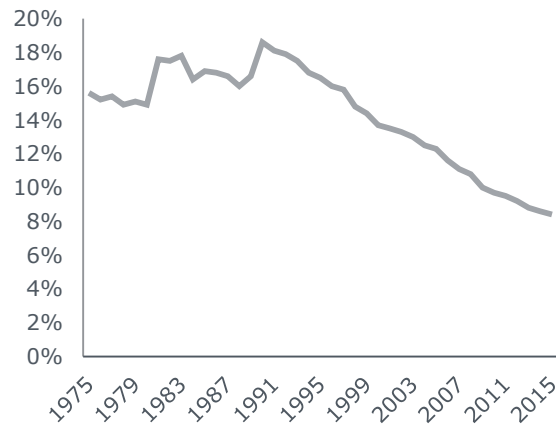
Asking More Alumni for Fewer Gifts

Median Number of Solicited Alumni and Alumni Donors, 2005-2015

Legend: Solicited Alumni — Alumni Donors
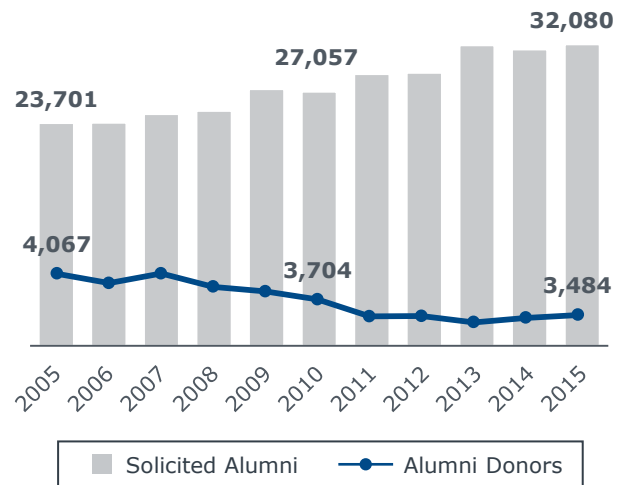
35% Increase in the number of solicited alumni since 2005

-14% Decrease in the number of alumni donors since 2005

Up until now, higher education has done an unsatisfactory job connecting with young donors. Participation rates have declined annually for the past 25 years, fueled in large parts by underwhelming acquisition and retention rates among the youngest alumni.

While larger graduating classes have swollen the denominator, compounding these participation declines, the growth in our alumni communities alone is not to blame. The total number of donors to higher education institutions has decreased by 14% since the middle of the last decade. There are simply fewer individuals willing to open their checkbooks and support their alma mater today than in the past.

Source: VSE Survey, 1975-2015; Advancement Forum interviews and analysis.

Donor Losses Not Confined to Higher Ed

Past 10 Years Brought Big Declines in Supporter Numbers to All Nonprofits

Nonprofit Donor Counts Contract

*Median Change in All Donors and New Donors
to Nonprofit Organizations, 2005-2015*

| 2007 | 2009 | 2011 | 2013 | 2015 |

-25.1%

-39.0%

*Recession
begins*

*Recession
ends*

All Donors — New Donors

> ❞
>
> **The Recession Is Only
> Half the Story**
>
> "Donors have been declining at a slow but remarkably consistent pace over the past 10 years…. The recession of 2007-2009 certainly had a negative impact on donor numbers, and particularly on new donor acquisition. But the longevity and consistency of the declines we have seen indicate that they have **deeper root causes than relatively short-term economic trends**."
>
> *Target Analytics
> donorCentrics Index of
> Direct Marketing Fundraising*

These declines have not been confined to higher education. Nonprofits everywhere have seen a contraction in donor counts in recent years. Drops in new donor acquisition have fueled much of this crisis. The average nonprofit saw its new-donor ranks shrink by 39% over the past 10 years.

Many observers incorrectly explain away these declines by pointing to the lingering aftereffects of the

Great Recession. While the economic downturn didn't help matters, the donor slow-down predated the financial crisis and has persisted long past its end.

Instead, the drop has been fed by a variety of seemingly irresolvable causes, including the crowded, competitive philanthropic landscape and donors' fleeting attention for gift appeals.

Major Gifts Depend on Early Acquisition

Annual Fund Serves Crucial Cultivation Role for Future Supporters

Jane Q. Donor's Path to Major Giving

First Gift

Average first gift of major donors is **$179**

First Leadership Gift

Donors on average take **seven years** to make a $1,000 gift

First Major Gift

54% of major donors **give for 16+ years** before $25K gift

GRADUATION ①···②···③···④···⑤ *MAJOR GIFTS*

Consistent Giving While Young

Donors who give every year for the first five years give **3x as much** as other donors by their 20th reunion

Frequent Upgrades

Donors who **upgrade consistently** have a **9x better chance** of one day giving a major gift

Persistent donor declines spell long-term trouble for college and university fundraising efforts. Philanthropic revenues depend heavily on a healthy pipeline of donors. Those pipelines are beginning to dry up.

The high-net-worth individuals who contribute the majority of university fundraising revenues begin giving long before making their first major gift. In most instances, these donors start giving small gifts at a young age, and they upgrade consistently for a decade or more before moving onto more transformative philanthropy.

This pipeline would fall apart were it not for a highly effective annual fund that brings donors in at the bottom of the pyramid, retains them over time, and upgrades their giving year over year.

Source: Bingley C, Gawor B, "The Threat of Declining Alumni Giving Rates to Higher Education Fundraising," Ruffalo Noel Levitz Webinar, March 22, 2016, https://www.ruffalonl.com/papers-research-higher-education-fundraising/2016/the-threat-of-declining-alumni-giving-rates-to-higher-education-fundraising; Meer J, "The Habit of Giving," *Economic Inquiry* (March 2013): 6; Barry F, et al., "Cultivating Lifelong Donors: Stewardship and the Fundraising Pyramid," Blackbaud (2010), https://www.blackbaud.com/files/resources/downloads/Book_CultivatingLifelongDonors.pdf; Advancement Forum interviews and analysis.

Winning Donor Mindshare in the Attention Economy

Maximizing ROI Through Multichannel Annual Giving

Beginning at the End of the Annual Giving Pipeline

Convert Almost-Givers	Compete for Awareness	Cultivate the Unconvinced
Make It Easy to Give	**Cut Through the Noise**	**Connect Alumni to a Cause**
⬤ Opportunity Size	◑ Opportunity Size	◑ Opportunity Size
◑ Population Size	◔ Population Size	◔ Population Size
Goal: Plug Leaky Renewal and Acquisition Pipeline	**Goal:** Expand Pipeline to Include Interested Lapsed Donors and Non-donors	**Goal:** Augment Traditional Donor Constituencies with New Donors

To refill the pipeline of future major donors, advancement professionals must rethink annual giving strategies.

They must focus on minimizing donor attrition by converting individuals who sit on the cusp of giving—so-called "almost-givers." Though this group is relatively small, advancement professionals have an outsized opportunity to inflect giving rates among these prospective donors.

They must also ensure that their appeals capture the attention of interested lapsed donors and non-donors by cutting through the noise. While these individuals may not be as easy a group to convert as

almost-givers, they will give if they receive the right appeal at the right time through the right channel.

Lastly, advancement professionals must expand their strategy to effectively cultivate the unconvinced. The ranks of skeptical alumni who resist giving back to the institution continues to grow. While appeals for unrestricted support will fall flat with them, they will respond to solicitations that focus on discrete, targeted, high-impact causes on campus.

Employing this three-pronged strategy will ensure that college and university development efforts win donor mindshare in our increasingly competitive attention economy.

eab.com

Make It Easy to Give

Convert Almost-Givers

2

- Minimize the "Melt Window"
- Hardwire Follow-Up Triggers
- Funnel Donors Toward Automatic Renewals

The Growing Ranks of Almost-Givers

Sitting on the Cusp of Giving but Not Opening Their Wallets

Alumni Think About Giving…

Millennial Giving Trends

45% Have made a gift to their alma mater

73% Intend to give to their alma mater in the future

84% Gave money to at least one nonprofit organization in 2014

…And Engage with Fundraising Appeals…

54%	**42%**	**16%**
Phone Answer Rate	Direct Mail Read Rate	Email Open Rate

…But Giving Remains Inconsistent

> **The Accidental Sybunt**
>
> "We discovered that, over the prior 20 years, the average time between gifts had consistently increased. Many donors who had previously given annually, or even more often, were now giving every 13 to 24 months. Our anecdotal understanding is that **many of them plan to make a gift every year but just forget.**"
>
> *Andy Shaindlin, Vice President*
> *Grenzebach Glier and Associates*

39% Of donors drop off every year in higher ed fundraising

Almost-givers, who sit on the cusp of making a gift to the institution, comprise a surprisingly large portion of the alumni population. Many of them have made a gift in the recent past and have thought about doing so again since then. Sometimes, they open a direct mail solicitation, leave it on the kitchen counter, and forget about it. Others click on an appeal link in a fundraising email and begin filling in their information, but get distracted before completing the process.

All of them have the best of intentions to support the institution. Unfortunately, life gets in the way. To bring more of these donors back onboard consistently—and to counteract the frighteningly high attrition rate from which higher education fundraising suffers—advancement professionals must do more to ensure that distractions and absentmindedness do not impede a donor's path to giving.

Convert Them at the Finish Line

Three Strategies for Boosting Almost-Giver Donations

Minimize the "Melt Window"

Speed donors through checkout to guard against distractions

Quick-Complete Giving Form

Hardwire Follow-Up Triggers

Remind donors who abandon the giving page of their initial intention to give

Abandon Gift Reminder Appeal

Funnel Donors Toward Automatic Renewals

Preempt conversion problems by increasing recurring gifts

Young Alumni Monthly Giving Campaign

Senior Donor Recurring Gift Pledge

To convert almost-givers and reduce the donor attrition rate, college and university advancement offices employ three strategies.

In the first, colleges minimize the "melt window" between when a donor decides to make a gift and when they complete their transaction. They do so by streamlining the checkout process.

The second involves automating follow-up outreach to those individuals who start giving but do not finish.

Lastly, some schools have begun to prioritize monthly and recurring giving to circumvent the donor attrition problem entirely. These institutions focus deliberately on high-risk populations, such as young alumni and graduating seniors.

The Perils of Bad Web Design

Costing You Dollars and Donors

The More Fields, The Fewer Gifts

Conversion Rate by Number of Form Fields

48% decrease

Number of Form Fields
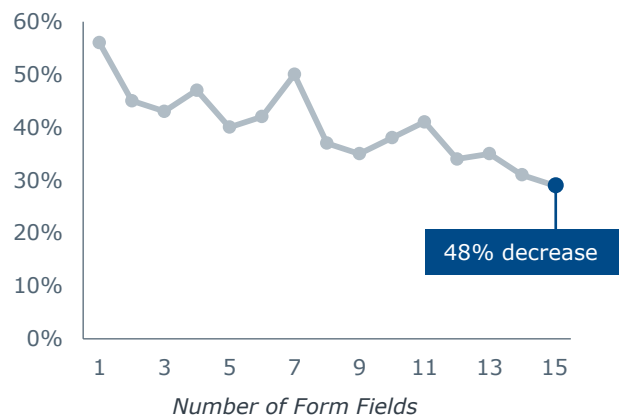
Higher Ed Giving Pages Found Lacking

EAB Audit of 28 Member Institutions

2	3	3	10	5	5
11-15	16-20	21-25	26-30	31-35	36-40

Number of Form Fields
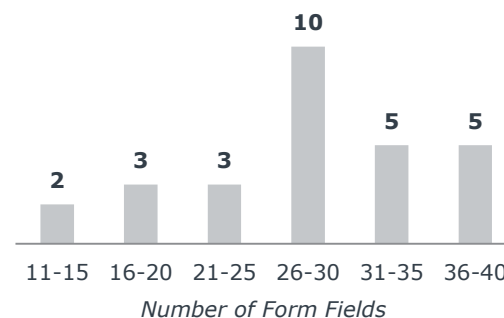
Losing Donors at the Finish Line

50%+ Of prospective donors who visit giving pages do not convert

---

A poorly designed giving page can prevent a surprising number of donors from giving. People have little patience for lengthy, complicated web forms. As the complexity of web forms increases, conversion rates drop off precipitously. By the time they reach 15 fields, the conversion rate drops off by nearly half.

Unfortunately, clunky giving pages are the rule, not the exception in higher education fundraising. A majority of university giving pages have far more than 15 fields. In fact, an informal EAB audit of members' giving pages found that over two-thirds required donors to fill out 26 or more fields before giving a gift.

The sheer difficulty of navigating through the checkout process helps explain why, by some accounts, over 50% of potential donors who visit the giving page never end up making a gift.

Practice 1: Quick-Complete Giving Form

Minimize the Melt Window

Practice in Brief

Advancement leaders replace complicated, cumbersome giving pages with streamlined checkout functionality. To accelerate the giving process, donors are asked to provide only the most critical pieces of personal information.

The giving page displays equally well on mobile devices as on desktop computers. For desktop users, cookies auto-populate many personal information fields, ensuring even faster checkout times.

Problems Addressed

Many would-be donors give up midway through filling out their alma mater's giving page. The overabundance of required fields, often numbering 25 or more, frustrates donors and contributes to "donor melt" when they are on the cusp of giving back.

Donors who attempt to give using a mobile device—for example, in response to an email appeal that they read on the go—struggle to navigate non-mobile-friendly giving pages. They close the page, intending to come back and complete their gift later. Few do.

Ultimately, the gift page restricts the institution's base of support to only the most committed and indefatigable donors whom no technological barrier will discourage.

Diagnostic Questions

1. Do more than 30% of visits to the giving page fail to result in a gift?
       ____Yes   ____No

2. Does your giving page ask donors to fill out 15 or more information fields?
       ____Yes   ____No

3. Do more than 25% of visits to the giving page come from mobile devices?
       ____Yes   ____No

4. Do visitors to the giving page have to scroll more than once to access required information fields?
       ____Yes   ____No

5. Does it take more than 30 seconds to complete a donation through your giving page?
       ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize a quick-complete giving form.

Institution Profiled

Williams College

- Institutional control: Private
- Enrollment: 2,200 (2,100 undergraduate)
- Carnegie classification: Baccalaureate Colleges (Arts & Sciences Focus)
- Campus setting: Distant town (Williamstown, MA)

An A-B Test for the Ages

Old Giving Form Goes Head to Head Against Streamlined Checkout

Williams College Randomly Places Alumni into Test Groups

Alumni click on giving link

Solicitations circulated as part of young alumni challenge

50% Get Standard Giving Form

Long checkout form gives the donor maximum control

50% Get Experimental Giving Form

Short checkout form offers few options but quick finish

Product Specs for the Two Pages

	Standard Giving Form	Experimental Giving Form
Number of Fields	25	11
Gift Amount Location	Toward the end	Beginning of first page
Supplemental Info	Class year, business address, etc.	None
Number of Pages	One	Three
Mobile Friendly?	No	Yes

Advancement leaders at Williams College suspected they might regularly lose too many donors due to their lengthy, complicated giving page. To find out, they ran an A-B test during a participation challenge against their rival, Amherst College.

Half of their alumni who clicked through to the giving page were presented with the traditional giving page. The other half landed on a much more streamlined giving page designed by the fundraising technology company Evertrue.

Source: Advancement Forum interviews and analysis.

eab.com

Faster Than You Can Say "Go Ephs!"

Simple, Elegant Design Expedites Giving

1 Amount

2 Contact Information

3 Payment Information
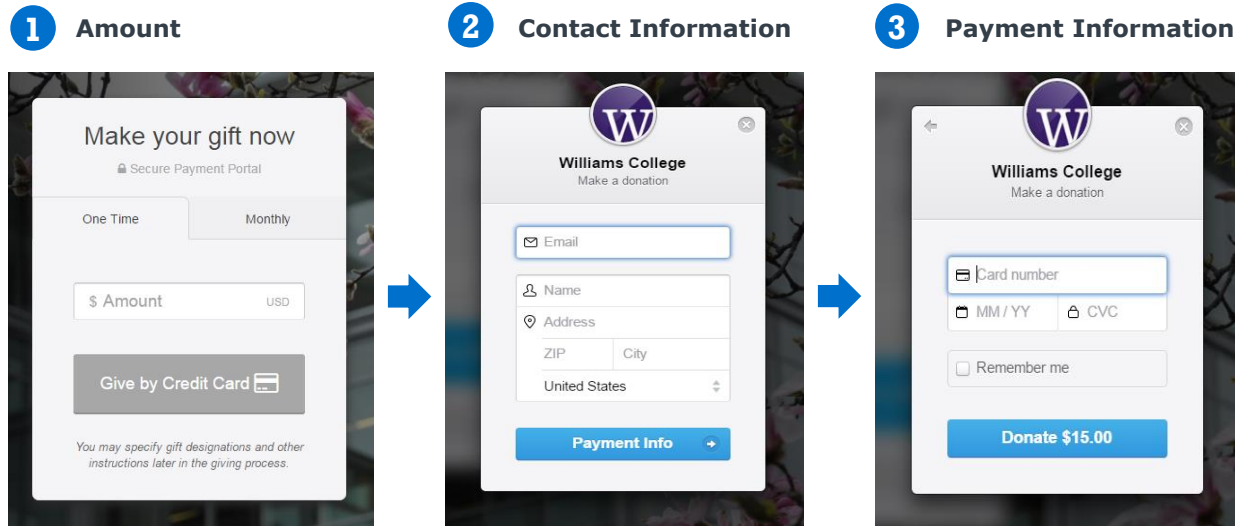
> ▶ Alumni can speed up checkout with **cookie-enabled autofill** option

The streamlined giving page guided alumni through the donation process seamlessly. The page contained just 11 fields for donors to fill out. Many of these fields auto-filled with information donors automatically stored in their web browsers. The mobile-optimized formatting allowed donors to easily complete their gift on the go.

All in all, donors could finish giving in under 15 seconds. This short time frame lowered the chance that a donor would grow frustrated with the giving page or get distracted midway through completing a gift.

A Clear Winner Emerges

Quick Complete Giving Form Outperforms Old Page by a Wide Margin

Standard Giving Page

55.7% Completion rate

Experimental Giving Page

75.0% Completion rate

Total Impact

19.3% Completion rate improvement

> ❞
>
> **The Business Case for Change**
>
> "When we started the three-week challenge, there was a lot of hesitation in our office. People were saying skeptically, 'We'll see what comes out of this challenge, we'll see then if we're still talking about making a change in our vendor.' But by the end, there was no question. I presented the final numbers, and **our VP said, 'OK, what do we need to do to switch?'"**
>
> *Laura Day, Director of Annual Giving*
> *Williams College*

Results from the experiment testify to the success of the streamlined giving page. Three-quarters of the individuals who visited the new page completed a gift. The traditional giving form's 55.7% completion rate pales in comparison.

Advancement leadership at Williams College took these results as a call to action. The skepticism that some advancement staff had toward the new giving page receded, and the chief advancement officer gave the go-ahead to switch vendors. Williams stood to lose too many donors otherwise.

Drop-Off Doesn't Have to Be Fatal

Commercial Recapture Strategies Hold Lessons for Higher Ed

Cart Abandoners Don't Mean to Say Goodbye
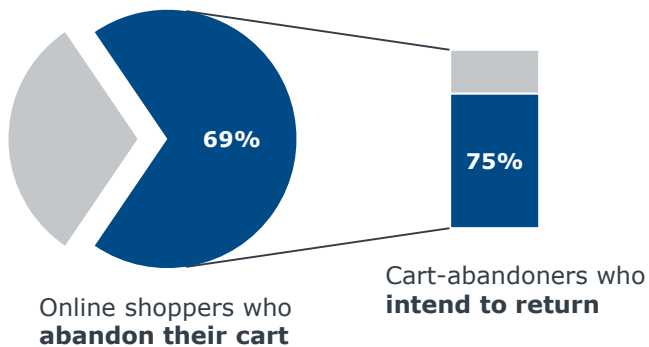
69%

Online shoppers who **abandon their cart**

75%

Cart-abandoners who **intend to return**

"Just a Helpful Reminder"

Abandon purchase follow-up emails have a **5.2% response rate** versus **1.9% industry average**

Even the best-designed giving page will not eliminate drop-off entirely. Still, not every donor who abandons a giving page rejects the idea of donating. For some, it's simply the wrong time. These donors may respond favorably to a gentle reminder later on.

Commercial industry has wholeheartedly embraced follow-up reminders for people who abandon their online shopping carts. These emails perform nearly three times as well as normal call-to-action emails.

Yet higher education fundraising has largely neglected to follow up with donors who tip-toe to the edge of giving before backing away.

Source: Baymard Institute, "33 Cart Abandonment Rate Statistics," January 14, 2016, http://baymard.com/lists/cart-abandonment-rate.

Practice 2: Abandon Gift Reminder Appeal

Hardwire Follow-Up Triggers

Practice in Brief

Advancement staff obtain a list (typically from their giving page provider) of prospective donors who visited the giving page but dropped off before donating. Annual giving staff reach out over email or by phone to prompt these drop-off donors to complete their gift. Follow-up comes within a short time after the drop-off, when the inspiration to give is still fresh in these individuals' minds.

Problems Addressed

Prospective donors who lose momentum right before giving rarely come back to complete their donations. They may have dropped off due to a momentary distraction or because it was the wrong time for them, but these temporary impediments become permanent when the institution does nothing to reach back out.

Diagnostic Questions

1. Do gifts through the online giving page constitute more than 25% of all annual gifts to your institution?
    ____Yes   ____No

2. Does your institution renew fewer than 70% of its prior-year donors annually?
    ____Yes   ____No

3. Are annual giving staff currently unable to track which prospective donors drop off from the giving page?
    ____Yes   ____No

4. Does your giving page provider have the ability to export lists of drop-off donors?
    ____Yes   ____No

5. Do prospective donors who leave the giving page have to wait more than one week before being resolicited?
    ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize an abandon gift reminder appeal.

Institutions Profiled

Dickinson College

- Institution control: Private
- Enrollment: 2,400 (all undergraduate)
- Carnegie classification: Baccalaureate Colleges (Arts & Sciences Focus)
- Campus setting: Small city (Carlisle, PA)

University of Memphis

- Institutional control: Public
- Enrollment: 20,600 (16,600 undergraduate)
- Carnegie classification: Doctoral Universities (Higher Research Activity)
- Campus setting: Large city (Memphis, TN)

Identify Lost Donors and Reach Out

Abandonment List Export Allows for Email Follow-Up

Recapturing Almost-Givers at Dickinson College

Abandonment → **Tracking** → **Follow-Up**

Abandonment	**Tracking**	**Follow-Up**
Alumnus/a begins gift form but does not finish checkout	Alumnus/a's name added to daily drop-off list compiled by vendor	Administrative assistant sends email reminder to alumnus/a 24-48 hours later

Hello Mary,

Thank you for your recent visit to the Dickinson College giving page! **We noticed that you started a gift but something must have happened along the way.** If you submitted your gift online already, please disregard this email. Otherwise, please give me a call at 555-555-5555 with questions or visit www.dickinson.edu/gift to complete the giving form!

Helping Alumni Fulfill Their Intentions

30%
Approximate response rate for follow-up emails during 2016 giving day

5%-10%
Approximate response rate for follow-up emails year-round (v. **1.5% response rate** for 2016 FYE email campaign)

8.3%
Overall alumni donor growth, 2013-2015[1]

Dickinson College bucks the drop-off trend by following up with donors who abandon the giving page. Every morning, Dickinson staff receive an automated list provided by iModules of alumni who visited the giving page but did not complete their gift. Within a day or two, an administrative assistant in the development office sends a gentle reminder asking them to donate.

The results of this modest strategy are outstanding. On Dickinson's giving day, nearly one-third of donors who left the giving page came back and completed a gift thanks to the abandon gift reminder email. During the rest of the year, about 5% to 10% of donors returned.

1) Alumni donor growth attributable to peer fundraising strategy as well as follow-up emails and other tactics.

Source: Advancement Forum interviews and analysis.

A Higher-Touch Reminder to Give

Phonathon Targets Giving Page Drop-Off to Capture Almost-Givers

Benefits of Phone Follow-Up at the University of Memphis

Ubiquity

Deploys **multichannel strategy** to effectively reinforce the ask

Urgency

Inspires **immediate action**, addressing main impediment to giving

ROI

Uses valuable student caller time on **high-propensity** prospect pool

Closing the Giving Gap

	Attempts	Pledges	Pledged Dollars	Average Pledge
General Phonathon (Spring 2015)	112,627	214	$8,935	$41.75
With Drop-Off Targeting (Spring 2016)	63,778	237	$12,536	$52.89
Year-Over-Year Change	*-43.4%*	*+10.7%*	*+40.3%*	*+26.7%*

Less effort…

…and more revenue

Advancement leaders could also use their phone programs to target donors who abandon the giving page. Using data on drop-off donors provided by Royall & Company Advancement, student callers at the University of Memphis targeted almost-givers to make their case for support.

The strategy ultimately brought in much more revenue than in previous years with much less effort. Student callers made 43.4% fewer call attempts, since they focused on individuals who were most likely to respond positively to a call. The number of pledges increased, as did the number of pledged dollars—the latter grew by nearly half over the previous fiscal year.

The Rise of the Subscription Economy

Consumers Flock to Automatic Payments and Seamless Transactions

A Rapidly Growing Sector

Subscriber Counts at 10 Companies (Millions)

62% growth over 3 years

Legend: Netflix, Spotify, Amazon Prime, Others[1]

(Chart showing area graph with years 2012, 2013, 2014, 2015 on x-axis and values 0 to 250 on y-axis)
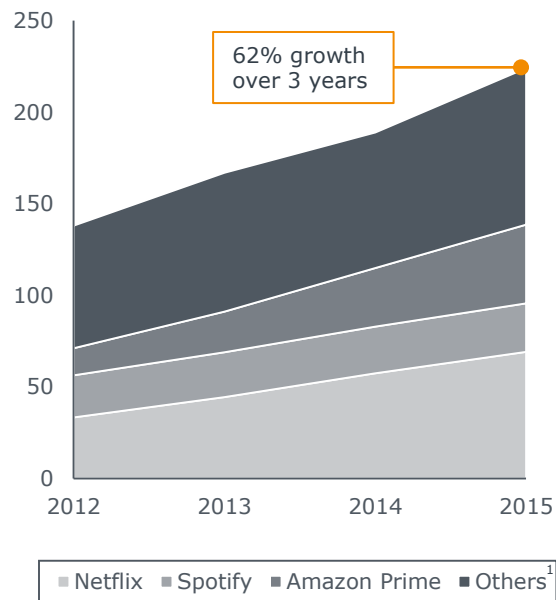
The Media Begins to Take Notice

FORTUNE — **It's a Subscription Economy and You're Just Living in It**

WSJ — **Zuora Raises $115 Million to Fuel Subscription Economy**

Business Leaders Scramble to Avoid "Disruption"

40% Of companies are moving to develop subscription-based business models

To further reduce donor attrition, some advancement leaders have begun to consider "subscription economy" models that eliminate the decision point entirely from the donation process.

The subscription economy refers to the growing trend of businesses automatically billing customers monthly in exchange for ongoing access to goods and services.

Subscription-based businesses include media companies such as Netflix and Spotify, as well as vendors like Amazon Prime.

The Path of Least Resistance

More Nonprofits Opt for Automatic Renewals

The Monthly Giving Wave Rises

Monthly Giving as a Share of All Online Giving

Year	Value
2010	5%
2011	8%
2012	11%
2013	16%
2014	17%
2015	17%

Overall monthly giving revenue grew 24% in 2015 alone
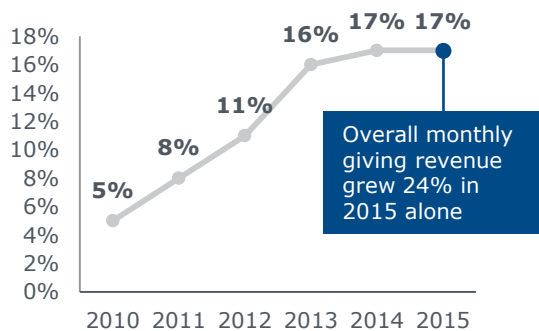
Good for Donors...

52% Of Millennial alumni express interest in monthly giving

...And Good for Nonprofits

2.9x Greater annual revenue from the average monthly donor

80% New monthly renewal rate

> ### Higher Ed Lagging Behind
>
> "Higher ed is far behind the nonprofit sector when it comes to monthly giving. Nonprofits realized years ago that this was the way to boost retention and get more annual revenue from donors. **We're only just now catching up**."
>
> *Chief Advancement Officer*
> *Private Master's University*

In the fundraising world, the subscription economy has led to the rise of monthly and recurring giving. Monthly giving grew explosively in the first half of this decade. It more than tripled as a share of nonprofit fundraising revenues, and it grew by 24% overall in 2015 alone.

It grew quickly thanks to the fact that donors like monthly giving. Over half of Millennial alumni say they would be interested in giving monthly gifts to the nonprofits they support.

Recurring gifts also bring outsized benefits to nonprofits. Average revenues and retention rates for monthly donors can exceed those of one-time donors many times over.

Despite the benefits of monthly and recurring giving, higher education advancement lags behind other nonprofits in adopting this strategy.

Practice 3: Young Alumni Monthly Giving Campaign

Funnel Donors Toward Automatic Renewals

Practice in Brief

A targeted annual giving campaign solicits recent graduates for small monthly gifts. Campaign scripting underscores themes that young alumni find meaningful, including environmental conservation and convenience. The case for support touches on the cumulative impact of monthly giving to demonstrate to young alumni that they can make a difference, despite not having major-gift capacity.

Problems Addressed

Donors who have the best intention of renewing their gift every year occasionally fail to do so. They may forget or procrastinate; regardless, the result is that they don't give. These risks repeat themselves every year, as colleges and universities require donors to resubmit their one-time gifts annually.

Adding to these challenges, higher education's success with major-gift fundraising causes young donors with little disposable income to doubt the value of their gifts to the institution. Some fall off after a few years of giving. Others never give at all.

Diagnostic Questions

1. Do fewer than 30% of new donors to your institution renew after the first year?
    ____Yes   ____No

2. Have fewer than 25% of all graduates of the last decade given at some point since graduation?
    ____Yes   ____No

3. Do young alumni express skepticism that their small gifts can have an impact?
    ____Yes   ____No

4. Can your gift processing platform accommodate ongoing pledges without an end date?
    ____Yes   ____No

5. Do donor relations staff have the capacity to provide monthly donors with segmented stewardship?
    ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize a young alumni monthly giving campaign.

Institutions Profiled

College of William and Mary
- Institutional control: Public
- Enrollment: 8,500 (6,300 undergraduate)
- Carnegie classification: Doctoral Universities (Higher Research Activity)
- Campus setting: Small suburb (Williamsburg, VA)

Tapping into Millennial Preferences

Develop a Monthly Giving Program Aimed at Young Alumni

Aligning the Message with the Audience

1 Convenience Is King

Young alumni often choose the path of least resistance; monthly giving allows for "fix it and forget it"

2 It's Good for the Environment

Paperless nature of recurring giving syncs with eco-friendliness of young alumni

3 Strength in Numbers

Monthly giving allows for the community to come together and support their alma mater

4 Small Gifts Add Up to Big Impact

Appeals address young alumni concern, "What can my small gifts really do?"

William & Mary's Young Alumni Monthly Giving Campaign

WILLIAM & MARY
CHARTERED 1693

THE MATH IS SIMPLE

If every undergraduate alum contributes as little as **$5 PER MONTH** this year, it will add up to over

$4,070,000!

As W&M alumni, our strength is in our numbers.

Make your gift today: **impact.wm.edu/recurring**

The College of William and Mary has gotten out ahead of the curve by launching a dedicated young-alumni monthly giving campaign. This past year, advancement staff mailed monthly giving appeals to recent graduates.

These appeals emphasized how monthly giving aligns with Millennial's passions and giving preferences.

They highlighted the convenience of monthly giving and its comparatively small environmental impact.

Most importantly, they underscored that monthly giving is the best way for small donors to collectively have a big impact.

Source: Advancement Forum interviews and analysis.

Boosting Donor Counts and Dollars

Young Alumni Embrace Recurring Gift Option

**Impressive Monthly Donor Growth
at William & Mary**

288%
Young
Alumni
Growth

	2014	2016
Total	436	1055
Young Alumni	104	300

■ Young Alumni   ■ Other Donors
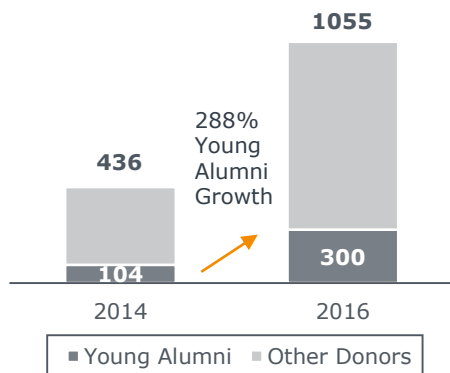
Predictably Strong Retention

86% Monthly donor renewal rate

Maximizing Potential Revenue

$90 — Average annual gift from young alumni donor

$203 — Potential annual revenue from monthly young alumni donor

$468K — Total annual recurring donor revenue
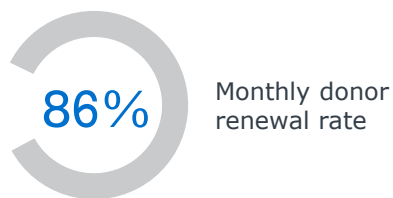
Appeals like the young-alumni monthly giving campaign have helped William and Mary more than double the number of monthly donors, and nearly triple the number of young-alumni monthly donors, over the past two years.

These donors give larger gifts and are retained at far higher rates than their one-time-giving counterparts. Together, their gifts culminate in nearly half a million dollars annually.

Source: Advancement Forum interviews and analysis.

Practice 4: Senior Donor Recurring Gift Pledge

Funnel Donors Toward Automatic Renewals

Practice in Brief

Graduating senior donors receive solicitations that ask for a two-year pledge in addition to a senior gift. Donors provide their credit card information and agree to automatically give the same amount on the next two anniversaries of their first gift. When the anniversary arrives, advancement staff charge donors' credit cards and steward their gifts appropriately.

Problems Addressed

The vast majority of graduating seniors who give to their class's senior gift campaign fail to renew during their first year after graduation.

Advancement staff lose an opportunity to capitalize on the momentum and enthusiasm of senior year. They must work to restart philanthropic relationships with donors whom they should be stewarding and upgrading.

In many instances, these donors never give again to the institution, undermining participation and narrowing the long-term major-gift pipeline.

Diagnostic Questions

1. Do fewer than 20% of graduating senior donors renew in their first year after graduation?

    ____Yes   ____No

2. Do advancement staff struggle to maintain accurate contact information for recent graduates?

    ____Yes   ____No

3. Does your senior gift campaign attract high levels of participation in recent years?

    ____Yes   ____No

4. Can your institution set the default online giving option to be a recurring gift?

    ____Yes   ____No

5. Do advancement staff host senior events where they can make the case in person for a recurring gift?

    ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize a senior donor recurring gift pledge.

Institutions Profiled

University of Tennessee

- Institutional control: Public
- Enrollment: 27,800 (21,900 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Midsized city (Knoxville, TN)

They Leave Right as They Arrive

Seeking to Plug a Leaky Senior Donor Pipeline

Senior Gift Program Grows…

University of Tennessee Senior Donors, FY 2014-FY 2015

Year	Donors
2014	587
2015	899
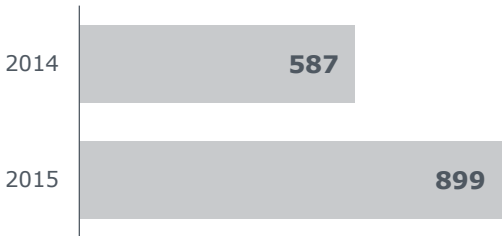
…But Suffers from Few Renewals

First-Year-Out Retention Rates

Year	Renewal Rate	Number of Donors
2014	**14%**	82
2015	**14%**	125

> **An Imperative for Change**
>
> "We looked at our data, and we saw a missed opportunity. Senior giving brought in a lot of new donors. The problem was the retention rate for that group was really low. We knew that we had to do something to shore up retention for post-grad seniors."
>
> *Lance Taylor, Associate Campaign Director*
> *University of Tennessee*

Inspired by the prospect of higher retention rates, the University of Tennessee has explored recurring giving in recent years. Rather than focus on young alumni, they targeted graduating senior donors with a recurring gift appeal.

Tennessee's senior gift program has grown quickly over the past few years. Unfortunately, graduating senior donors renewed at low rates the first year after graduation.

Advancement leaders at Tennessee knew they had to find some way to bring these donors back into the fold beyond the typical renewal appeal.

Source: Advancement Forum interviews and analysis.

Two Years of Guaranteed Renewals

Seniors Sign Up for Automatic Annual Pledge

Annual Recurring Donation Process at the University of Tennessee

1 Graduating senior decides to give a gift

2 Donor selects annual recurring option on giving form

3 Credit card is charged on the **same date for the next two years**

Two Strategies for Soliciting Seniors

Event-Based Asks

Fundraisers at senior events trained to ask for recurring gifts

Opt-In Default Online

Email donors must deselect recurring giving to opt out

Building a Base of Long-Term Support

10%

Of senior donors signed up for the recurring gift

108

Recurring donors will give for at least two years

21%

Projected senior-donor retention, FY 2017[1]

To shore up retention rates for senior donors the year after they graduate, Tennessee turned to a recurring gift solicitation.

When graduating seniors make their gift, advancement staff ask them to sign onto an automatic two-year pledge. Tennessee charges their credit card for a gift of the same amount on the anniversary of their donation for the first two years after graduation.

In 2016, 10% of graduating senior donors opted to sign onto the recurring gift pledge. As a result, the overall retention rate for this graduating class is expected to be over 21%—seven percentage points higher than past years' retention rates.

---

1) Estimating an 85% retention rate for recurring gift donors and a 14% retention rate for other senior donors.

Source: University of Tennessee, Knoxville, TN; Advancement Forum interviews and analysis.

Avoiding Potential Pitfalls in Recurring Giving

Four Recommendations for Side-Stepping Common Obstacles

Four Frequent Challenges to Recurring Giving

Expirations	**Fraud**	**Donor Inertia**	**Infrastructure**
Credit cards hit expiration date and donors do not renew	Unexpected cancellations lead to lost gifts	Monthly donors forget about their gift and do not upgrade	System is unable to process open-ended recurring gifts
1 Proactive Outreach	**2 Multichannel Reminders**	**3 Annual Upgrades**	**4 Technical Workarounds**
Segment upcoming expirations for high touch pre-renewal cultivation	Formalize plans for multiple renewal touches through diverse channels	Solicit for larger monthly gifts on donation anniversaries	Set the default pledge length to exceed the credit card expiration date

While monthly and recurring giving brings benefits to advancement's efforts to retain donors, these strategies present challenges of their own.

Credit card expirations and fraud cases can leave the advancement office with inaccurate payment information. Donors may grow comfortable with a low level of giving and neglect to upgrade. At some institutions, the gift system may not accommodate perpetual recurring payments.

We've outlined here some strategies for circumventing these challenges, such as formalizing credit-card update plans and donor upgrade campaigns. Institutions whose technical infrastructure limits the ability to solicit ongoing monthly gifts may also be able to implement a technical workaround.

40

Cut Through the Noise

Compete for Awareness

3

- Cluster Appeals into
  Micro-campaigns
- Introduce Giving Deadlines
- Embrace the Transactional Mentality

Raising the Bar for Outreach

Commercial Marketing Strategies Shape Alumni Expectations

Expectations of Today's Alumni...

Daily Offers

Constant product updates, sales pitches, and buying reminders

Buying Deadlines

Time-bound deals for customers who act quickly

Give to Get

Crowdfunding projects that offer incentives for donations

...Not Met by Annual Fund Outreach

Infrequent Outreach

One-off seasonal solicitations are easily overlooked and forgotten

Open-Ended Asks

Alumni are not given any time frame in which to take action

Unpersuasive Value

Annual giving staff are caught off guard by "what's in it for me?"

One of the reasons that annual giving offices struggle to win donor mindshare is that their appeals lack the modern marketing features that grab people's attention.

Commercial organizations and nonprofits have made a habit in recent years of circulating high-frequency, high-volume, high-urgency appeals. Customers and donors hear almost daily from the organizations with which they interact. They receive "expiring offers" emphasizing short-term deadlines for action. In many instances, they may also be promised a physical reward in exchange for financial support.

Annual giving appeals pale in comparison. Alumni hear from their alma mater infrequently, sometimes as rarely as once a year. Annual giving staff leave the time frame for action open-ended. Lastly, for alumni who increasingly ask, "What's in it for me?," the value proposition of annual giving falls flat.

Cutting Through the Noise

Adapting the Annual Giving Playbook to Today's Consumers

Three Lessons from Best Practice Institutions

1 Cluster Appeals into Micro-campaigns

Send multiple appeals in a short time window

Profiled Practices

- Concentrated Email Blitzes
- Multiplatform Digital Nudges

2 Introduce Giving Deadlines

Specify a campaign end date to inspire immediate action

Profiled Practices

- Society Membership Calls to Action

3 Embrace the Transactional Mentality

Explore give-to-get campaigns for priority alumni populations

Profiled Practices

- "Give to Get" Fundraising Campaigns
- No-Cost Experiential Rewards

Annual giving staff can ensure that their appeals cut through the noise by employing three strategies.

First, they can transition from one-off digital touches to concentrated digital micro-campaigns. Second, they can use giving deadlines to elevate urgency among donors and inspire immediate action.

Lastly, they can embrace the transactional mentality and pilot give-to-get campaigns in limited, strategic ways.

Together, these approaches put annual giving outreach on a level playing field with commercial and nonprofit appeals.

Source: Advancement Forum interviews and analysis.

Practice 5: Concentrated Email Blitzes

Cluster Appeals into Micro-campaigns

Practice in Brief

Advancement staff send donors multiple email solicitations in a short period of time. The appeals share a theme, such as student scholarships, faculty research, or year-end giving.

To avoid donor fatigue, staff position the appeals as a bounded campaign with a beginning and end, rather than an endless stream of email solicitations.

After the end of each campaign, advancement staff scale back donor communications and focus those that donors do receive on stewardship and engagement. The campaigns may repeat multiple times each year, albeit with different themes.

Problems Addressed

Donors receive either too few or too many email appeals. Many institutions send infrequent one-off emails that donors easily overlook or ignore. Interested non-donors who notice the first appeal but don't take action must wait months for a follow-up appeal—by which point their inspiration has subsided.

At other institutions, email appeal frequency is so heavy and so boundless that donors learn to tune out appeals or—even worse—unsubscribe entirely.

Diagnostic Questions

1. Does your database contain email addresses for more than 30% of your current and prospective donors?
   ____Yes   ____No

2. Do you send fewer than 10 or more than 30 email solicitations annually?
   ____Yes   ____No

3. Have you seen recent upticks in online gifts?
   ____Yes   ____No

4. Do you continue to allocate most staff time to direct mail and phone solicitations?
   ____Yes   ____No

5. Is your email unsubscribe rate below 0.20% per message?
   ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize concentrated email blitzes.

Institutions Profiled

Georgetown University
- Institutional control: Private
- Enrollment: 18,500 (7,600 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Large city (Washington, DC)

University of Florida
- Institutional control: Public
- Enrollment: 50,600 (33,400 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Midsized city (Gainesville, FL)

Capitalize on December 31

Multi-touch New Year's Eve Campaign Brings Outsized Returns

Last Minute Gifts Are Spread Across December 31

Percentage of Online NYE Donations by Hour for All Nonprofits

No single high-giving moment to target
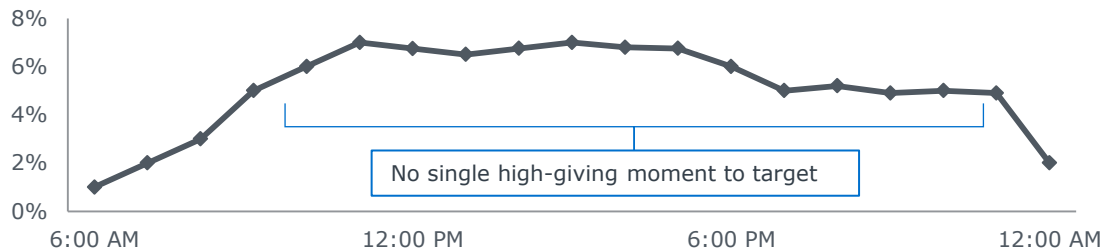
Georgetown's NYE Outreach Schedule

7 AM ✉@ "Last day of 2015 to get your gift in!"

12 PM ✉@ "We're halfway there!"

4 PM ✉@ "Time's running out!"

10 PM ✉@ "Only two hours to make your gift"

Phenomenal Results

2,490 Donors brought in by NYE emails

10% Of all donors annually

$740K Dollars raised

While many advancement leaders fear that they oversolicit their alumni, the truth in many instances is that they're not soliciting enough—or in a coordinated enough fashion.

New Year's Eve is a great opportunity for determining whether alumni have a higher tolerance for digital solicitations. It is the highest-giving day of the year, and many universities take that as a reason to send out one last-chance email solicitation.

Unfortunately, every other nonprofit also avails themselves of this opportunity, so the university's appeal quickly drops to the bottom of alumni's inboxes.

Georgetown University ensured that they would be heard over this noise by developing a one-day concentrated email blitz strategy. Starting at 7 a.m. on New Year's Eve, Georgetown sent its alumni four email solicitations. These simple solicitations issued a clear call to action to donate before midnight repeatedly throughout the day.

Georgetown's concentrated email blitz ultimately brought in 10% of all of its annual donors and raised $740,000.

Building Momentum Over a Week and a Half

Email Micro-campaigns Develop an Audience for the Ask

Digital Micro-campaigns at the University of Florida

10-Day Solicitation Window

Launch Email
"Be our partner in the Gator Good…"

Reminder Email
"Help us continue this important work. Join us…"

"Cooling Off" Period

1   2   3

FALL

New Campaign

WINTER

Last-Chance Email
"We have until midnight to reach our goal…"
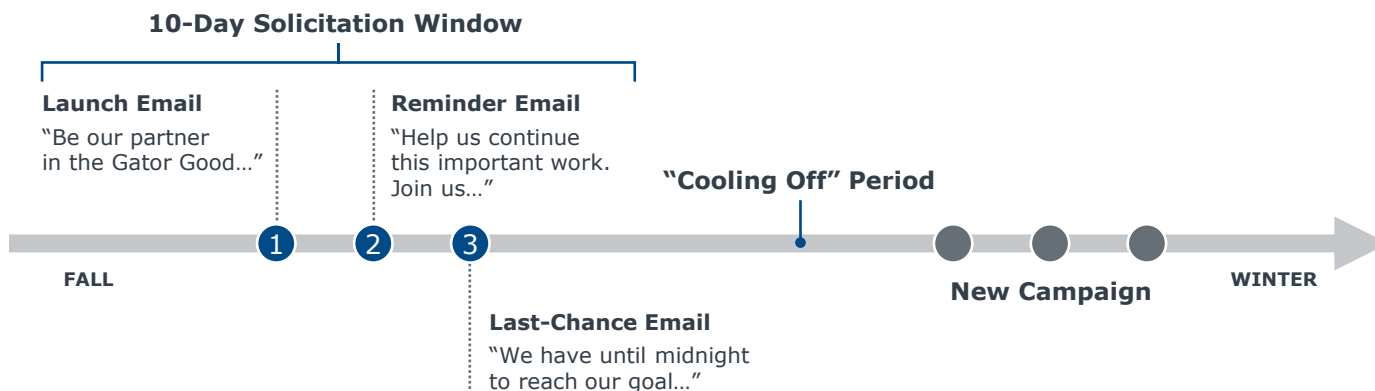
Getting Noticed in Crowded Inboxes

> We wanted to do more in the digital space. Our asks were buried in long copy and contained graphics that had been retrofitted from print media. We saw email and online giving as **an area of huge untapped potential for UF** and were excited to begin testing different tactics."
>
> *Elizabeth Keppel, Associate Director of Annual Giving*
> *University of Florida*

The University of Florida implemented an even more comprehensive micro-campaign strategy starting in fiscal year 2016.

Rather than a one-day blitz, Florida sends prospective donors three email solicitations over a 10-day period once a quarter. The emails all share the same theme, such as the impact of student scholarships or faculty members' groundbreaking research.

In between micro-campaigns, Florida mandates a "cooling off" period in which prospective donors receive far fewer communications. Those they do receive focus on engagement and showing the impact of gifts.

eab.com

High-Volume Strategy at the Core

Multiple Email Reminders Significantly Boost Giving

Alumni Interest Sustained Over Duration of Campaigns

Campaign Email Open Rates

First Email	Second Email	Third Email
25%	20%	25%
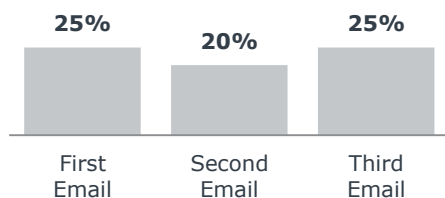
Campaign Email Clickthrough Rates

First Email	Second Email	Third Email
0.8%	0.6%	0.7%

Florida Exceeds Dollar and Donor Goals

FY 2016 Goals and Outcomes

	Dollars	Donors
FY 2015 Results	$143,540	1,017
FY 2016 Goal	$186,602	1,576
FY 2016 Growth Goal	30%	55%
FY 2016 Results	$317,359	2,540

121%
Growth over FY 2015

149%
Growth over FY 2015
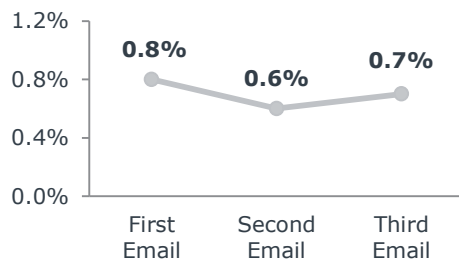
The quarterly micro-campaigns see sustained engagement from alumni. Nearly a quarter of recipients open each of the emails, and clickthrough rates stay strong from the first to the last email.

More important than engagement, of course, are the strategy's results. Advancement leaders at Florida hoped the new approach would bring in more dollars and donors. They had no idea how successful they would end up being. The new digital strategy more than doubled their returns year-over-year, boosting dollar totals by 121% and donor counts by 149%.

Divided Attention Online

Email-Only Digital Strategy Out of Sync with Alumni Behaviors

One of Many Channels

Daily Time Spent with Digital Media, 2012 (Minutes)

Pie chart segments:
- Email: 18%
- Social: 20%
- Online Video: 13%
- Search Engines: 12%
- Online Games: 9%
- Blogs: 4%
- Other: 25%
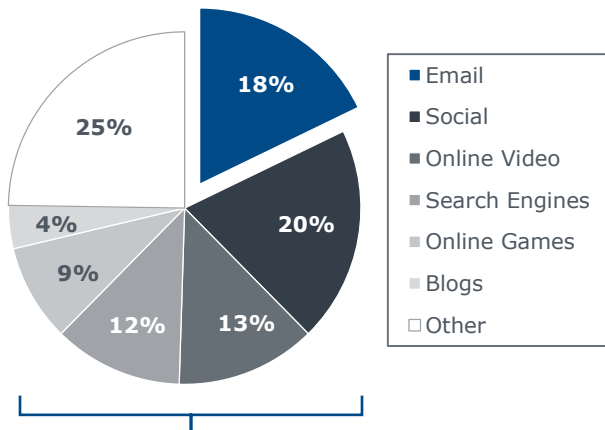
Email accounts for less than 1/5 of time spent online

Email Appeals Rarely Cut Through Digital Noise

Reads newspaper online…
"Kanye West said what?!"

Browses Facebook…
"Aunt Lisa is posting again…"

Checks email…
"Give now? I should, soon."

Shops online…
"They have it in my size!"

Email appeal drowned out by other channels

While email is a necessary fundraising channel, and advancement leaders should do all they can to maximize results through email, it alone is no longer sufficient for a high-impact digital strategy.

Donor attention is shifting to a wide variety of digital platforms, and advancement leaders who do not follow suit by diversifying the digital channels they use to cultivate donors may see their returns shrink over time.

Practice 6: Multiplatform Digital Nudges

Cluster Appeals into Micro-campaigns

Practice in Brief

Alternative digital channels complement email fundraising efforts by reinforcing the ask wherever alumni's online attention goes.

Paid social media ads, text message appeals, alumni website pop-ups, and targeted web ads present prospective donors with a clear call to action and consistent branding.

A branded landing page reinforces the campaign's message and sustains donors' inspiration through the end of the donation process.

Problems Addressed

Donors divide their attention across many digital platforms. Whereas donors once looked to email for most of their inbound digital appeals, today they consider solicitations and advertisements delivered to them through a profusion of channels.

Social media, online video, mobile devices, and other tools occupy a growing share of donors' time, yet colleges' and universities' digital fundraising strategies haven't kept up. Many annual giving shops continue to take a single-channel approach when it comes to digital.

With so little donor mindshare to capitalize on, universities see declining returns from their online outreach efforts.

Diagnostic Questions

1. Has email solicitation effectiveness declined in recent years?
   ____Yes   ____No

2. Is your institution's digital strategy confined to email, social media days of giving, and crowdfunding?
   ____Yes   ____No

3. Do you currently have budgetary flexibility to experiment with alternative channels?
   ____Yes   ____No

4. Are you approaching a time of year that could lend itself to a branded micro-campaign, such as reunion, homecoming, or Giving Tuesday?
   ____Yes   ____No

5. Does your annual giving or marketing/communications staff have some degree of expertise in digital marketing?
   ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize multiplatform digital nudges.

Institutions Profiled

Muhlenberg College

- Institutional control: Private
- Enrollment: 2,400 (all undergraduate)
- Carnegie classification: Baccalaureate Colleges (Arts & Sciences Focus)
- Campus setting: Midsized city (Allentown, PA)

University of Southern California

- Institutional control: Private
- Enrollment: 43,400 (18,800 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Large city (Los Angeles, CA)

Practice 6: Multiplatform Digital Nudges (cont.)

Cluster Appeals into Micro-campaigns

Institutions Profiled (cont.)

Boston College

- Institutional control: Private
- Enrollment: 14,400 (9,800 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Small city (Chestnut Hill, MA)

University of California, San Diego

- Institutional control: Public
- Enrollment: 32,900 (26,600 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Large city (La Jolla, CA)

Boost Visibility Across the Web

Institutions Adapt Campaigns to a Multichannel World

Four Digital Channels to Test

Paid Social Ads

- Campaign ads appear in alumni social media feeds

- $35 spent on 3 ads with average reach of 2,400 alumni per post.

MUHLENBERG
C O L L E G E

BOSTON
COLLEGE

Text Message Solicitations

- Alumni asked to opt into texts from the university

- Two-thirds of texts are news and updates; one-third are asks

USC

UC San Diego

Alumni Website Pop-Ups

- Visits to alumni website on Giving Tuesday triggered matching gift pop-up appeal

- Median pop-up gift was $75, 200% higher than all other channels

Targeted Web Ads

- Side bar and banner appeals appear on third-party sites

- Targeted alumni were 20 times more likely to make a gift

Colleges and universities across North America have risen to the challenge by experimenting with "alternative" digital fundraising strategies.

These include using paid social advertisements to boost campaign reach, engaging alumni through text messages, prompting alumni website visitors to give through pop-up appeals, and deploying a series of web ads that appear for donors wherever they go on the web.

Source: Advancement Forum interviews and analysis.

Everywhere You Look

Targeted Web Ad Campaign Repeatedly Reinforces Ask

At UC San Diego, a Consistent Ask...

- ✓ Clear call to give
- ✓ Unified branding across channels
- ✓ Campaign landing page preserves messaging

...Played on Repeat Across the Web

Campaign Impressions

2.1M Total campaign impressions

26 Average impressions per household

4 Months of appeals running
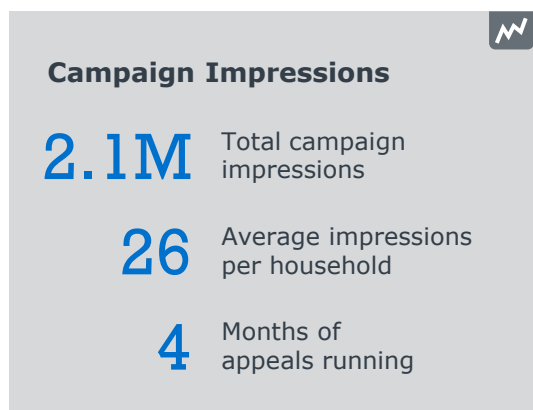
❝ From a multichannel standpoint, it repeats key messages and lets us get in front of people. It's very powerful."

Meredith Blair
Executive Director of Annual Giving
University of California, San Diego

The University of California, San Diego (UCSD) partnered with Blackbaud's Connection 360 platform in 2014 to solicit alumni across multiple digital channels.

The campaign featured a clear call to action and consistent branding, including on a dedicated campaign landing page. The ads appeared across the web, expanding UCSD's reach beyond a single digital channel.

Most importantly, the campaign repeated the ask enough times for alumni to take action. While an alumnus/a might see an email or direct mail solicitation once, alumni saw UCSD's web ads 26 times during the four-month campaign period.

Source: University of California, San Diego, San Diego, CA.; Advancement Forum interviews and analysis.

Strong Returns from Unexpected Segments

Campaign Performs Particularly Well with Least Loyal Donors

UCSD Web Ads Bring 8.5:1 ROI...

Campaign KPIs	
Households	79,848
Gifts	**1,044**
Donors	892
Response Rate	1.12%
Average Gift	$162
Revenue	**$169,798**
Revenue per Donor	$190
Campaign Cost	$20,000
ROI	**8.5:1**

...And Make Headway with Challenging Donor Populations

Gifts by Donor Type

595	199	250
Frequent Donors	Infrequent Donors	Non-donors

Dollars Raised by Donor Type

$105K	$28K	$36K
Frequent Donors	Infrequent Donors	Non-donors

43% Of gifts contributed by infrequent and non-donors

38% Of revenue contributed by infrequent and non-donors

Not only did UCSD's web ad campaign bring in donors and dollars, it succeeded with the least likely constituents.

The campaign raised nearly $170,000 from over 1,000 gifts, totaling about $8.50 for every $1 spent on the campaign. Much of this revenue came from alumni who had given infrequently in the past, as well as alumni who had never before given to UCSD. 43% of

gifts and 38% of revenue came from these populations.

While other outreach strategies had not been able to effectively cultivate and engage these populations, UCSD's web ad campaign reinforced the ask and captured their mindshare in a way that inspired action.

eab.com

The "I'll Give Tomorrow" Mentality

Traditional Solicitations Fail to Inspire a Feeling of Urgency

Gifts Slowly Trickle In, But Some Donors Still Forget

Post-Appeal Giving Timeline

Missed Donors

"I hope they're still accepting gifts"

"Oh, I almost forgot to give"

Campaign Total

30% put it off indefinitely

"Sure, my checkbook is right here"

10%

20%

70% of all likely donors end up giving

40% of all likely donors

Day 1   Day 10   Day 30
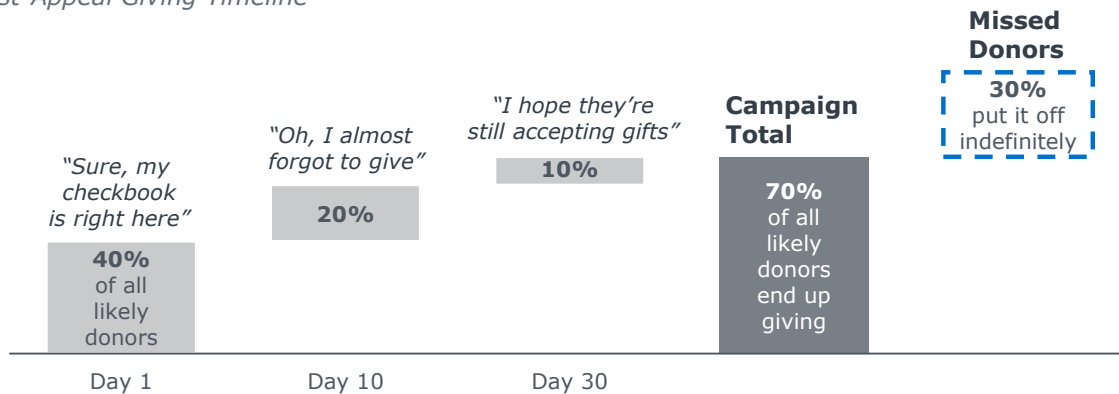
The Long Tail of Giving

> " I'm still getting gifts from direct mail appeals we sent out two years ago. Alumni put them in their drawer and say, 'I'll do it later.' But lots of times they don't."

Annual Giving Director
Public Master's University

Giving deadlines can also move donors to take action immediately. That's because a large share of potential donors intend to give but procrastinate in doing so.

The reasons are many: appeals land at the wrong time; donors are on their way out the door; they mean to give but get distracted by something else.

Whatever the cause, the consequence of the "I'll give tomorrow mentality" is lost gifts from otherwise generous supporters.

Source: Advancement Forum interviews and analysis.

Give Them a Reason to Donate Now

Use Donation Deadlines to Inflect Alumni Behavior

Higher Returns When You Add Urgency

$60 — Average gift when nonprofit **does not use a deadline**

$93 — Average gift when nonprofit **uses a deadline**

15% — More clickthroughs for email campaigns with an expiring offer

Three Urgency Levers

1 **Calendar Deadlines**
- Fiscal Year End
- Calendar Year End

2 **"Unlocking" Deadlines**
- Challenge Grants
- Society Memberships

3 **Goal-Oriented Deadlines**
- Dollar Goal
- Donor Goal

Less Arbitrary

More Arbitrary

Attaching a deadline to an appeal counteracts donors' impulses to put off giving. In addition, it can boost engagement and average gift size.

Colleges and universities typically use three types of giving deadlines to increase conversion rates. The most common type is also the least arbitrary. Calendar and fiscal year deadlines have real budgetary and tax implications, and nearly every advancement office runs some sort of campaign in conjunction with them.

Goal-oriented deadlines are deadlines that advancement staff append to normal appeals. They urge donors to give by a certain campaign end date, but they do not offer any benefits or premiums for doing so.

"Unlocking" deadlines motivate donors to give immediately because they will gain access to gift society benefits or tap into a limited-duration matching gift. We will explore "unlocking" deadlines in greater depth across the next few pages.

Practice 7: Society Membership Calls to Action

Introduce Giving Deadlines

Practice in Brief

Advancement leaders use membership in a consecutive giving society to front-load renewals. Rather than wait until the end of the fiscal year, staff select two midpoint deadlines and circulate early renewal solicitations that publicize the selected date.

While donors who do not give by the early deadline still have plenty of time to gain or preserve their membership in the society, the urgency of the appeals inspires many to renew early. Attrition declines as a result of fewer donors being "at risk" when the fiscal year approaches.

Problems Addressed

Donors delay giving back in response to open-ended appeals. They assume there is little reason to act immediately, since the institution will always need donations.

Many of the individuals who gave last year end up lapsing because they inadvertently miss the year-end deadline.

Diagnostic Questions

1. Does your institution currently offer multiyear donors membership in a consecutive giving society?
   ____Yes   ____No

2. Do last year's donors lapse at a rate greater than 25%?
   ____Yes   ____No

3. Do most renewals come in at calendar year end and fiscal year end?
   ____Yes   ____No

4. Do loyal donors typically give less frequently than every 12 months (e.g., every 14 to 20 months)?
   ____Yes   ____No

5. Do you offer lapsed donors a "buy back" program that allows them to reclaim membership in the consecutive giving society?
   ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize society membership calls to action.

Institutions Profiled

Georgetown University

- Institutional control: Private
- Enrollment: 18,500 (7,600 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Large city (Washington, DC)

The Rise of Two-Year Loyalty Societies

Stewardship Strategy Combats Attrition and Inconsistent Giving

Two-Year Minimum for Half of All Consecutive Giving Societies

EAB Analysis of Member Institutions' Societies

n=62

First renewal appeal offers donors society membership

- 31%
- 50%
- 6%
- 13%

- 2 Years
- 3 Years
- 5 Years
- No Loyalty Society

Georgetown University's Loyalty Society

Levels
- Charter: 2-4 years
- Milestone: 5-9 years
- Lifetime: 20+ years

Benefits
- Exclusive webinars
- Special access at homecoming events
- Bookstore discount
- Career services support
- Georgetown address labels
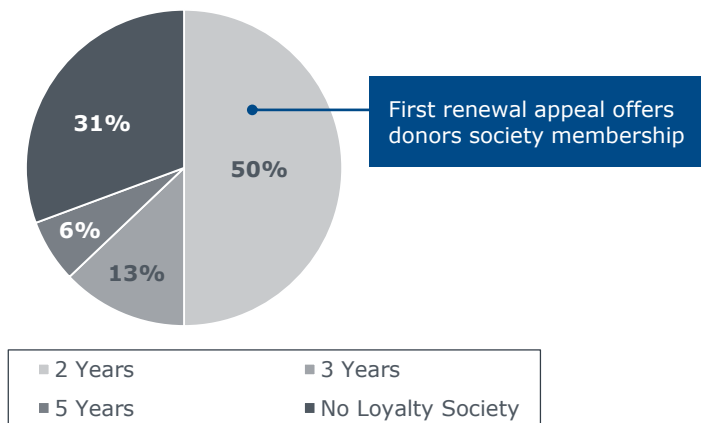
Gift societies offer donors a reason to give beyond pure altruism. While gift societies have historically used dollar minimums to encourage upgrades, many institutions have sought to bolster donor counts and minimize attrition in recent years by launching consecutive giving societies.

To gain membership in a consecutive giving society, a donor must give for a certain number of years in a row. Half of consecutive giving societies induct new members after two years of giving, while others use three- or five-year minimums.

Georgetown University launched a consecutive giving society at the beginning of this past decade. Members have access to a number of premium benefits, such as exclusive webinars and career services support.

Source: Advancement Forum interviews and analysis.

A Push to Expedite Renewals

Mid-Year Deadlines Front-Load Loyalty Society Gifts

Georgetown University Preempts End-of-Year Push with Mid-Year Campaigns

July 1	*Artificial Deadline:* November 30	*Artificial Deadline:* April 30	*Hard Deadline* June 30
Start of Fiscal Year Gifts will qualify donors for loyalty society membership	**First Society Campaign** 4-week push for 400 society gifts	**Second Society Campaign** 4-week push for 500 society gifts	**End of Fiscal Year** Hard deadline for loyalty society gifts
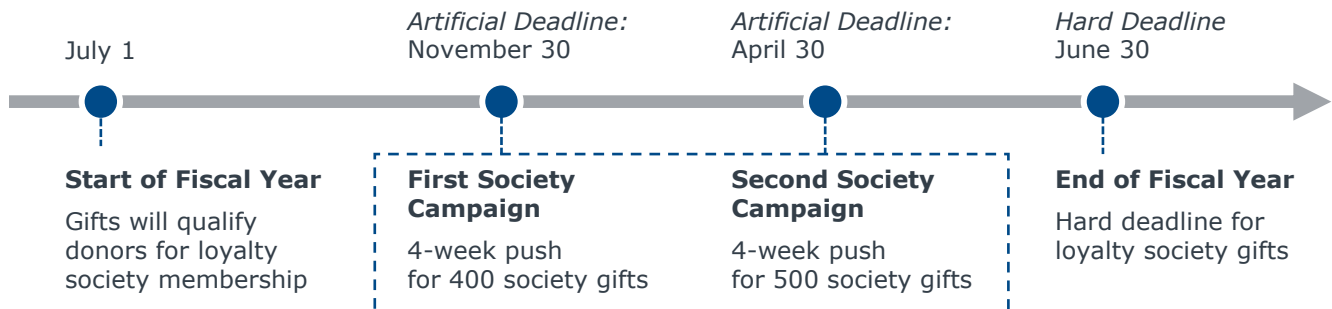
Key Campaign Elements

One email per week sustains urgency over campaign's duration

Thermometer in emails tracks progress to fundraising goal

Solicitations sent to all eligible loyalty society prospects

To gain or sustain membership in the consecutive giving society, Georgetown donors must give before the end of the fiscal year. To avoid the problem of donors delaying their gift until the final deadline—and potentially forgetting to give at all—Georgetown runs two "artificial deadline" campaigns centered on the consecutive giving society throughout the year.

In the late Fall and mid-Spring, Georgetown staff publicize a midpoint deadline—November 30 and April 30, respectively—that donors must give by to qualify for or preserve their society membership. Although giving after the date does not affect their eligibility, the deadline provides both a reminder and urgency for getting gifts in quickly.

Source: Advancement Forum interviews and analysis.

Renewing Donors Across Segments

Deadline Campaign for Loyalty Society Brings in Diverse Donors

Loyalty Society Appeal Goals by Segment

Boost New Donor Retention

Get donors to second year of giving to boost long-term retention

113 Donors responded

Renew Loyal Donors Earlier

Spread renewals out to avoid rush at the end of the year

669 Donors responded

Recapture Lapsed Donors

Offer opportunity for renewal to donors whose membership has recently lapsed

128 Donors responded

Explosive Donor Growth

Undergraduate Loyalty Society Members, 2009 and 2015

11,600 (2009)

14,000 (2015)

21% growth
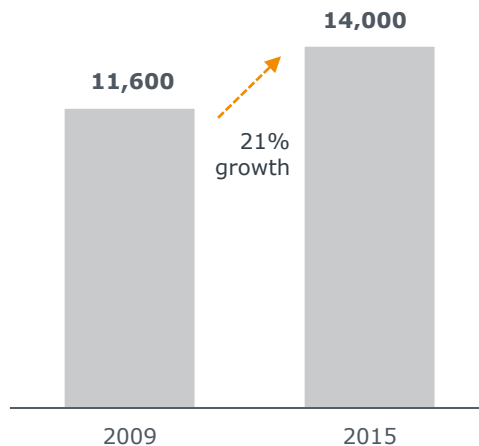
These deadline-driven society membership campaigns succeeded across donor segments. They inspired 113 new donors to give for a second year, thereby qualifying them for society membership for the first time. They helped front-load renewals from 669 loyal donors. Lastly, a special targeted offer allowing lapsed donors to rejoin the gift society resonated with 128 of them, resulting in gifts.

Overall, strategies like these have supported Georgetown's success in growing its society membership by 21% across a six-year period.

eab.com

Controversy Surrounds Transactional Giving

Chief Advancement Officers Disagree About the Wisdom of Incentives

Not a Good Use of Donors' Dollars

"In the early 1990s, we sent out a lot of widgets and swag as part of the annual giving program. We thought that it might motivate donors to give. But the feedback we ended up getting was, '**Don't spend my money on trinkets**.' I would rather this money be used to support the university's programs.' We have mostly shied away from it since. For a lot of our supporters, it doesn't feel like true philanthropy. Public radio uses it well, but I don't know if it's right for us."

Chief Advancement Officer
Public Research University

Despite Old Misgivings, It Really Works

"I've completely flip-flopped on the transactional mentality in just the last five years. I used to think that it was only right for athletics donors, who give to get their tickets. For everyone else, it was sacrilege. But in those five years **I started realizing that donors need some sort of carrot** to take action. Our appeals that have a decal or bumper sticker or magnet are always more successful than identical appeals without them. So I think we have to move in this direction."

Chief Advancement Officer
Public Master's University

Transactional fundraising campaigns also have the potential to cut through the noise and inspire donors to give. Transactional fundraising involves offering donors a physical object, such as a t-shirt, tote bag, or coaster, in exchange for their gift.

Historically, transactional giving has received a tepid welcome in higher education. Some chief advancement leaders believe it's a better fit for public radio or television, while others have seen pushback from donors who don't want to see their donations spent on tchotchkes.

Yet it's beginning to attract a small following among advancement leaders. Some fundraising professionals, eager to find ways to grab donors' increasingly scarce attention, have tested transactional campaigns in recent years. The success they've enjoyed has changed their minds about the appropriateness of these campaigns for higher education.

Source: Advancement Forum interviews and analysis.

Practice 8: "Give to Get" Fundraising Campaigns

Embrace the Transactional Mentality

Practice in Brief

Donors receive tokens of appreciation, such as a pair of socks or a tote bag, in exchange for their gift. Unlike with stewardship rewards, advancement staff heavily publicize the token of appreciation up front as part of the campaign.

The item in question possesses an air of exclusivity. In some cases, donors can only obtain it through the campaign. It serves as a visual reminder for the donor of their connection through philanthropy to the institution.

Problems Addressed

Initially, many donors feel reluctant to give unconditionally. Crowdfunding platforms and nonprofit incentive campaigns have taught donors to eschew action unless they can identify a clear reward they will obtain from their gift. Appeals to pure altruism increasingly fall flat.

In addition, individuals who give often lapse because they forget about their gift. Form thank-yous do little to underscore the donor's investment in the institution, since many are immediately thrown out. Over a period of months, the act of giving grows more remote, and when a new appeal arrives, donors barely remember their previous generosity.

Diagnostic Questions

1. Has new donor acquisition lagged in recent years?
   ____Yes   ____No

2. Could the advancement office develop a partnership with the bookstore or another purveyor of institutionally branded goods to provide donor rewards at low cost?
   ____Yes   ____No

3. Do alumni often wear institutionally branded apparel?
   ____Yes   ____No

4. Can your IT colleagues build a landing page for the campaign?
   ____Yes   ____No

5. Would a transactional giving campaign fit with your institution's alumni culture?
   ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize "give to get" fundraising campaigns.

Institutions Profiled

University of Chicago

• Institutional control: Private

• Enrollment: 15,400 (5,600 undergraduate)

• Carnegie classification: Doctoral Universities (Highest Research Activity)

• Campus setting: Large city (Chicago, IL)

The Transactional Mentality in Higher Education

Incentive Campaign Offers Socks to Donors

University of Chicago Sock Campaign Microsite

UChicago Socks Collection: 2015 Traditions Socks

Give Now

Traditions Socks are back for one day—today—only! This is your last chance to get UChicago traditions socks before they walk out the door forever. These 2015 UChicago custom socks are inspired by the quirky and intellectual traditions UChicago calls its own: Kuvia, Scav, Shake Day, and the recently reinstated Lascivious Costume Ball. The socks were designed by an undergraduate-founded company, as were 2013's history of the "C" socks and last year's scholar socks.

College alumni supporters who make a gift of $35 or more today, June 30, 2015, will receive a pair of traditions socks as a thank-you for their generosity. There's a limited supply left, and after today we're closing out this design.

SOCK DETAILS

The socks are midcalf dress socks and a blend of cotton, nylon, and spandex. They are available in small/medium (women's size 6-9, men's 4-7.5) and medium/large (women's size 9.5-12.5, men's 8-13). Indicate your size preference in the special instructions section when you make your gift.

Salute the sun and your shins.

1 of 5

SHARE YOUR SUPPORT

When you share your support you magnify the impact of your gift by inspiring others to give. The details of your gift and private information will not be shared.

Giving Gains at Chicago

Alumni Donor Counts, 2010-2015

- 2010: 29,753
- 2015: 34,971
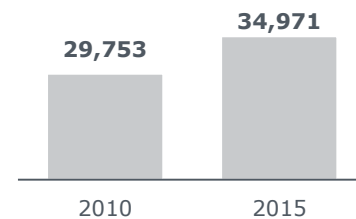
Alumni Participation Rate, 2010-2015

- 2010: 20.7%
- 2015: 21.9%
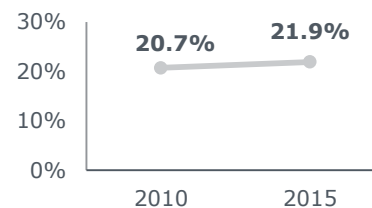
The University of Chicago is one institution that has embraced transactional giving. Starting in 2013, the institution began soliciting alumni for gifts in exchange for limited edition pairs of University of Chicago socks.

The socks feature designs created by Chicago graduates. They often invoke shared experiences of the Chicago alumni community, such as school traditions or authors in the famed Core Curriculum.

Strategies like these have helped Chicago grow its donor base over the past half decade.

Practice 9: No-Cost Experiential Rewards

Embrace the Transactional Mentality

Practice in Brief

A targeted micro-campaign offers donors rewards in exchange for donations. However, advancement staff substitute intangible recognition for physical objects to reduce the transactional nature of the gift.

Instead of offering every donor a reward, advancement staff enter them into a raffle. The uncertainty of the reward conditions donors to give for its own sake.

Problems Addressed

Prospective donors increasingly fail to give without an incentive for doing so. Yet offering a physical object as a reward for giving may run afoul of some institution's culture or anger donors who do not want to see their dollars spent on tchotchkes.

Tokens of appreciation may also counterproductively teach donors to ignore appeals that do not have rewards, ultimately undermining retention. Still, advancement leaders know that their non-incentive appeals perform more poorly than their incentive-based counterparts.

Diagnostic Questions

1. Does your advancement division's leadership worry about the negative effects of transactional giving?
   ___Yes   ___No

2. Do your donors also give to nonprofits that use physical rewards to promote giving?
   ___Yes   ___No

3. Is your social media presence well established enough to create momentum around a viral campaign?
   ___Yes   ___No

4. Do alumni identify with any particular school traditions that could provide a theme for experiential rewards?
   ___Yes   ___No

5. Are there any slow-giving times of year during which your institution can test an experiential reward campaign?
   ___Yes   ___No

If you answered "Yes" more times than "No," you may wish to prioritize no-cost experiential rewards.

Institutions Profiled

Wake Forest University

- Institutional control: Private
- Enrollment: 7,800 (4,900 undergraduate)
- Carnegie classification: Doctoral Universities (Higher Research Activity)
- Campus setting: Midsized city (Winston-Salem, NC)

Incentives Without the Transaction

Naming Rights for Minor Campus Landmarks Playfully Attracts Donors

NAMING RIGHTS FOR THE REST OF US → (OPEN TO ALL) ←

ALTIERI HILL
THE WAKE FOREST FUND

THE FLAT SPEED BUMP

...will from this point on be known as Altieri Hill, thanks to Michael ('03) and Danielle ('06) Altieri. Every time you awkwardly hesitate, pump the brakes or brace for a bump that doesn't exist, we hope you'll thank them.
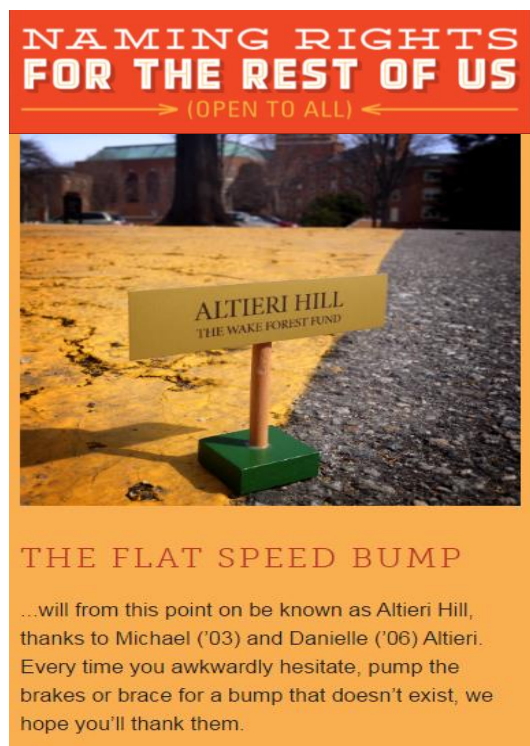
Wake Forest's "Naming Rights for the Rest of Us" Campaign

- Fully digital campaign: 2-3 emails a week, social media, microsite with videos
- Nine campus landmarks eligible for naming, including a "flat speed bump"
- Two naming rights raffled off every week
- Campaign ran during February, a low-giving month

Keeping the Campaign Top of Mind

" We offered two new things to name every week. That meant there was a reason to keep paying attention across all of February. It was a powerful call to action."

Blake Absher, Director of the Wake Forest Fund
Wake Forest University

Advancements leaders who want to offer donors an incentive to give but feel uncomfortable with give-to-get should consider incentives without the transaction.

Wake Forest University launched a non-transactional, wholly digital incentive campaign in February 2016 that offered young alumni donors the chance to win "naming rights for the rest of us."

Every week during the campaigns, donors were entered into a raffle to have their names attached to small, humorous campus landmarks. These included a flat speed bump, a tulip in a landscaped median, and the skillet that the dining hall chef uses when he prepares students' meals.

Winners of naming rights had their names printed on small signs that student photographers captured next to the designated location. Advancement staff uploaded these pictures to social media and to the campaign's landing page.

"Naming Rights for the Rest of Us"

Quirky Campaign Captures Alumni Attention

Campaign Engagement Metrics

10K+ Unique page views

94% Of microsite visitors had never viewed giving page

31% Open rate for campaign emails (versus 20% overall average)

Giving Rates for February 2016

32% Increase in alumni donors (versus February 2015)

80% Increase in dollars (versus February 2015)

$180K Dollars raised during campaign
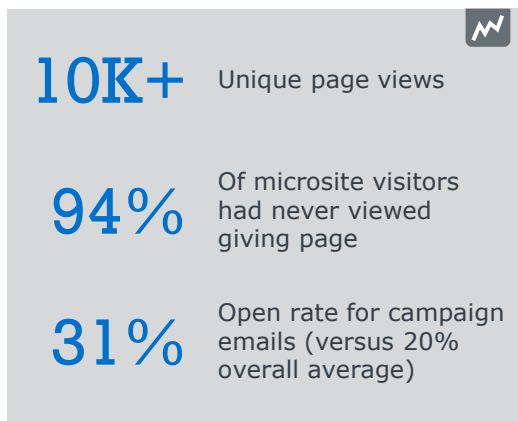
The campaign generated impressive engagement among young alumni. Nearly all of the 10,000 visitors to the landing page had never before visited the university's giving page.
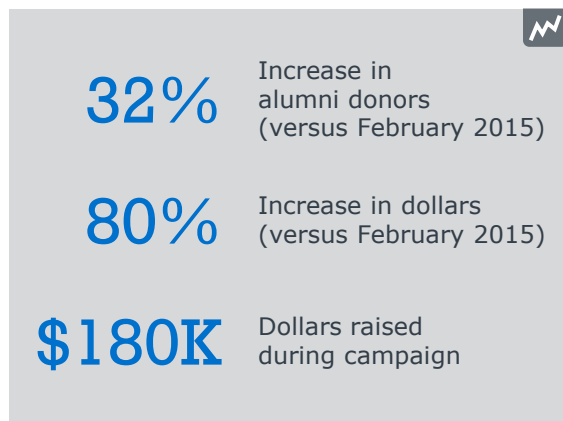
On top of that, the campaign boosted gifts to the institution during a notoriously slow time of year. Donors increased by 32% and dollars increased by 80% over the previous year.

Source: Advancement Forum interviews and analysis.

EAB

Connect Alumni to a Cause

Cultivate the Unconvinced

- Solicit for "Common Denominator" Causes
- Enfranchise Campus Partners
- Put Donors in the Driver's Seat

Failing to Convince Skeptical Alumni

Millennial Alumni Skeptical About Giving to Higher Ed

Often very generous…

61%

Of Millennial donors give to 3 or more nonprofits annually

…but prefer charities…

75%

Would give to another nonprofit before their alma mater

…over higher education

55%

Have never donated to their alma mater

Higher Ed Not Delivering on Impact

"It would never cross my mind to give to my school. If I can only give $100, **you get to see that go so much farther with a smaller, more localized cause**. If you give $100 to a school you might get a thank-you note. It almost feels like giving your money to the mall."

Katie Randall
25-Year-Old Augustana College Graduate

Young alumni have proven particularly skeptical of giving back to their alma maters. Although Millennials give generously to a variety of philanthropic causes, three-quarters of them prefer to support charitable organizations other than their alma mater.

This reticence stems from the perceived lack of impact that young donors can have by giving to their alma maters. When compared to small nonprofits with discrete missions, colleges and universities struggle to show how annual fund gifts allow young donors to achieve their philanthropic goals and affect change in the world around them.

A Socially Conscious Generation

Millennials Support What's Meaningful to Them

Giving Motivations Diverge by Generation

Primary Reason for Giving

55% **63%** — Passion for the Cause
65% **36%** — Organization Relies on Donations

Legend: ☐ Silent ◼ Boomer ◼ Gen X ◼ Millennial

A Belief in Big Impact

52% Gave to a social issue in June 2016

82% Would give to specific projects and purposes

Unrestricted Giving's Share of Total Giving

25% 20% 15% 10% 5% 0%

20.7% ... **15.7%**
16.8% ... **11.5%**
8.6% ... **4.3%**

2005 — 2015

Legend: —— All —— Public —— Private

Compared to other generations, Millennials care disproportionately about effecting change. Their passion for causes motivates them to give to a greater degree than any previous generation.

In contrast, they find loyalty to organizations an underwhelming reason to donate. While Silent Generation and Boomer donors give because the organizations they care about rely on their gifts to continue operating, Millennials instead focus on results, outcomes, and impact.

College and university advancement offices overlook a large population of potential donors by failing to publicize their impact and tap into Millennials' philanthropic passions. Young donors prove highly willing to give to organizations that demonstrate how their work impacts the causes about which they care.

To date, few higher education advancement offices have successfully done so, which explains in part recent declines in unrestricted giving.

Crowdfunding Taps into Passion for Causes

Highlighting Targeted Ways to Make an Impact

Cornell University's Crowdfunding Platform

1 **Focus on Impact**

Platform branding underscores how small gifts make a difference

2 **Passion-Oriented Projects**

Funding opportunities mimic niche nonprofit organizations

3 **Something for Everyone**

Diversity of projects satisfies needs of various alumni groups

1,705 Gifts to Cornell crowdfunding, October 2015 to May 2016

In recent years, colleges and universities have tapped into young donors' philanthropic passions by launching crowdfunding initiatives.

Crowdfunding involves raising small amounts of money online for narrowly defined projects from a large number of donors. Donors can track the project's progress toward the goal, read testimonials and case statements from project leaders, and see pictures of beneficiaries.

Cornell University is one of many institutions that began exploring crowdfunding in the early part of this decade. In the years since the initial launch, Cornell's crowdfunding efforts have matured significantly. Today, they use crowdfunding to show donors the impact they can have on whatever on-campus project resonates with them.

Cause Fundraising Still Lives at the Margins

Crowdfunding Relegated to "Afterthought" at Many Universities

Limited Reach
- Projects promoted exclusively to leaders' personal networks
- Potential donors outside of project leaders' networks never hear of compelling campaigns

Unresponsive to Demand
- Overwhelming alumni interest in a particular topic rarely results in a campaign
- Projects chosen based on which students and faculty want to participate

Lack of Expertise
- Project leaders rely on intuition and minimal training to raise money
- Annual giving staff's knowledge of best practices has little bearing on campaign outcomes

Narrow Appeal
- Esoteric projects overly focused on specific activities and goals
- Renewals complicated by lack of broader alignment with alumni social missions and goals

Crowdfunding has proven popular in higher education fundraising thanks to its appeal to young alumni and non-donors. Yet crowdfunding alone may not move the needle over the long term on colleges' and universities' young donor acquisition problems.

At many institutions, crowdfunding is a "side of the desk" activity for the annual giving office. Annual giving professionals neglect to use crowdfunding projects strategically to cultivate and acquire high-priority non-donors. Conversely, crowdfunding project leaders do not avail themselves (or are prohibited from using) the extensive expertise and resources of the advancement office.

While many institutions intentionally preserve this disconnect—they want crowdfunding project leaders to connect with donors "organically" without the heavy hand of university advancement—ultimately it hampers efforts to make inroads with skeptical alumni who resist giving back.

Source: Advancement Forum interviews and analysis.

Putting Cause Fundraising at the Core

Moving from One-Off Projects to Systematic Efforts

Solicit for "Common Denominator" Causes

Circulate appeals for impact funds that resonate with a critical mass of alumni

----

Tactics

- High-Volume Impact Appeals
- Priority Population Message Testing

Enfranchise Campus Partners

Collaborate with faculty and staff to identify and solicit affinity groups

----

Tactics

- Affinity Giving Campus Collaborations

Put Donors in the Driver's Seat

Organize giving opportunities into high-interest cause categories

----

Tactics

- Cause-Oriented Giving Page

Increasingly, advancement leaders aim to better connect alumni to causes they care about through annual giving. They do this in a number of ways.

First, they integrate causes that resonate broadly, such as study abroad support and student research projects, into their appeals.

Second, they collaborate with campus partners to scale the work of putting together multiple cause-focused solicitations.

Lastly, they empower alumni to find the project or fund that is most meaningful to them through smart website redesigns.

Practice 10: High-Volume Impact Appeals

Solicit for "Common Denominator" Causes

Practice in Brief

Advancement staff identify gift designations that a large number of alumni would find meaningful. They focus on experiences that many alumni have in common or areas of campus that alumni would collectively want to impact through philanthropy.

The resulting gift solicitations focus on these designations, downplaying broader institutional support. The focus is on a bounded choice of funds to capture a broad segment of donor passions.

Problems Addressed

Donors increasingly want to give in a way that has a direct impact on beneficiaries' lives. Solicitations that make a broad, institutional ask do not always align with those passions.

Yet donors' interests are diverse and often highly specific. Advancement staff struggle to scale the work of soliciting each donor for a gift to the exact fund that they find most meaningful.

Diagnostic Questions

1. Does your institution allow the annual giving office to pursue restricted or donor-designated gifts?
   ____Yes   ____No

2. Has unrestricted giving in the annual fund declined in recent years?
   ____Yes   ____No

3. Can advancement staff identify three causes on campus for which most alumni or alumni from a particular school routinely express enthusiasm?
   ____Yes   ____No

4. Is it feasible to gather information on the impact of donors' gifts to these causes and integrate it into stewardship materials?
   ____Yes   ____No

5. Do these causes align with annual leadership upgrade opportunities on campus?
   ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize high-volume impact appeals.

Institutions Profiled

University of North Florida
- Institutional control: Public
- Enrollment: 15,700 (13,800 undergraduate)
- Carnegie classification: Master's Colleges & Universities (Larger Programs)
- Campus setting: Large city (Jacksonville, FL)

Lifting the Unrestricted Veil

Shine a Spotlight on Discrete Priorities That Donors Can Impact

The University of North Florida Changes Course

From Loyalty Appeals...

Old Model: Solicit for UNF's Greatest Needs

❝ If I ask someone to write me a $100 check without sharing what it's for, few are going to sign on the dotted line."

Donor Counts Declining

2,843   2,594   2,356

2013   2014   2015

...To a Focus on Impact

New Model: Highlight High-Passion College Funds

❝ We started asking the colleges for the areas of opportunity where people could make an impact and likely experienced themselves."

College of Business Impact Appeal

Solicitation highlights three impact opportunities

Career Center   Study Abroad   Scholarships

0.51% Response rate for appeal to mostly **lapsed and non-donor** population

---

The University of North Florida recently reoriented appeals for graduates of its business school away from institutional support. Now, they solicit for targeted, high-passion projects that resonate broadly in the alumni community.

Donor counts at the university had declined for years, due in part to a broad unrestricted fundraising strategy. Alumni had little insight into what priorities their dollars could affect and consequently little motivation to give.

In response, advancement leaders reframed appeals for the Coggin College of Business. They highlighted three designations that a large portion of the alumni population would find meaningful—the career center, study abroad, and scholarships.

Response rates among lapsed and non-donors climbed as a result of these "common denominator" cause appeals.

Source: Advancement Forum interviews and analysis.

Practice 11: Priority Population Message Testing

Solicit for "Common Denominator" Causes

Practice in Brief

Social media engagement data points advancement staff to topics and themes that resonate with priority populations, such as non-donors.

Staff solicit these populations for gifts to funds that align with the content they engaged with online.

Problems Addressed

Advancement staff struggle to identify what resonates with their most unresponsive donors. These individuals rarely engage through philanthropy or alumni relations programming, so their interests remain shrouded in mystery.

Unrestricted asks fall flat, as do open-ended asks for restricted gifts. While staff suspect there's likely some cause that would move non-donors to give, they can rarely figure out what that cause is.

Diagnostic Questions

1. Do advancement staff struggle to identify a high-interest fund that would inspire non-donors to give?
   ____Yes   ____No

2. Do your institution's social media accounts generate enough engagement and activity to merit analysis?
   ____Yes   ____No

3. Does your institution have the technical capability to export engagement data and match it to database records?
   ____Yes   ____No

4. Does your institution allow donors to give to a range of funds and projects that overlap with university news stories and social media content?
   ____Yes   ____No

5. Does your institution have a stewardship and retention plan in place for donors who give to restricted funds or crowdfunding projects?
   ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to implement priority population message testing.

Institutions Profiled

Massachusetts Institute of Technology

- Institutional control: Private
- Enrollment: 11,300 (4,500 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Midsized city (Cambridge, MA)

Social Media Sheds Light on Non-donor Affinities

Facebook Data Helps Identify Highest-Potential Solicitation Theme

MIT's Strategic Solicitation Development Process

Assess Engagement Analytics

Identify priority population to target

Analyze engagement data to find what resonates best

Craft into Campaign

Find ready-made solicitation opportunity

Send email appeal to all non-donors for selected fund
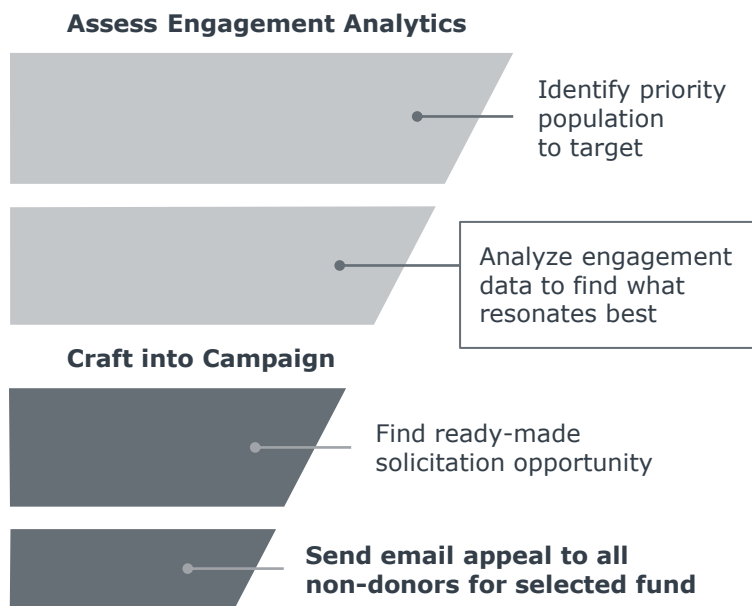
Robotics Facebook Post Overperforms

Massachusetts Institute of Technology (MIT)
College & University · 695,152 Likes · May 29 ·

Jumping cheetah! This MIT #robot clears hurdles while running at 5 mph. Watch: http://mitne.ws/1eD1MTf

Image: Haewon Park, Patrick Wensing, and Sangbae Kim

2,781 Likes · 135 Comments · 542 Shares

👍 Like   💬 Comment   ➤ Share

View Post Engagers
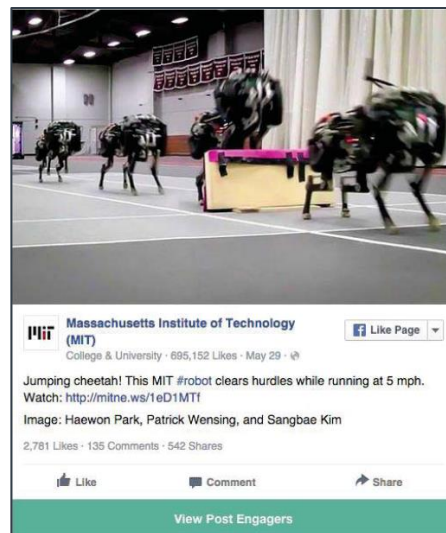
The Massachusetts Institute of Technology (MIT) recently began soliciting alumni for high-passion projects. Rather than guess which causes would move alumni to give, advancement leaders decided to use social media engagement data to identify topics.

In partnership with Evertrue, MIT analyzed which Facebook posts performed best with non-donors.

They found that a story about a student robotics group generated intense enthusiasm among alumni non-donors.

They followed up on this piece by soliciting all non-donors for a gift to the robotics group's crowdfunding campaign.

Robotics Solicitation Strikes a Chord

Analytics Point to the Right Cause for Non-Donors

Email Appeal Nearly Doubles Donors…

*Total Robotics Campaign Donors,
April-May 2015*

Robotics appeal sent
to all non-donors

172

141

80

24

April 15   May 19

The non-donor robotics solicitation ultimately helped bring in an additional 90 donors to the project. Many of these individuals had never before given a gift to the institution.
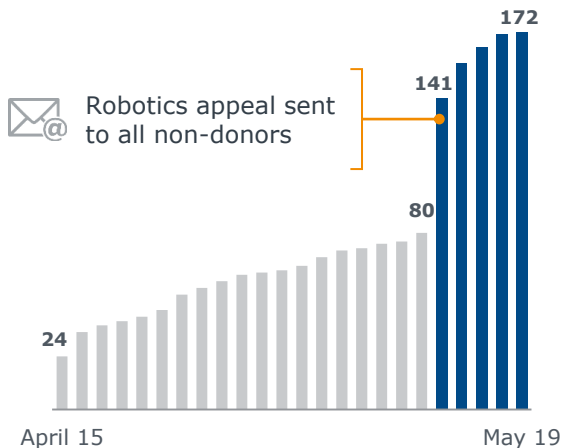
…And Surfaces Leadership Gift from Non-Donor

Total Robotics Campaign Dollars

$29,000

$20,000

Targeted solicitation yields $20,000 gift from a **rated non-donor** who had never taken a visit

More importantly, the solicitation elicited a $20,000 gift from a non-donor who had never before taken a visit with MIT.

Embrace the Diversity of Alumni Interests

"Common Denominator" Appeals Overlook Countless Affinities

From a One Size Fits All Approach...

1,001 Affinities

❝ Our alumni care about so many different things. How can we possibly capture that in mass appeals?"

...To More Nuanced Affinity Segments

Manageable Segments

❝ We address each of our affinity groups individually. Personalizing by cause has brought big returns."

Two "Force Multiplier" Approaches

Enfranchise Campus Partners

Enlist faculty and staff members to help identify segments and compile appeals

Put Alumni in the Driver's Seat

Curate funds into compelling causes and let alumni choose what resonates with them

---

Common denominator appeals highlight ways that alumni can have an impact on their alma mater. Yet they only offer a small, undifferentiated range of giving options to a wildly diverse community of prospective donors.

This one-size-fits-all approach discourages alumni from giving when the cause for which they're solicited does not match their interests. Advancement offices can no longer simply show impact up front. They must show the right impact to the right donor.

Advancement professionals have begun to explore how to better group prospective donors into manageable segments based on affinity. They employ two primary strategies for doing so: they enfranchise campus partners, and they put alumni in the driver's seat.

Practice 12: Affinity Giving Campus Collaborations

Enfranchise Campus Partners

Practice in Brief

Campus partners fill in the gaps in advancement's knowledge of alumni affinities. They help identify constituents for whom a personalized solicitation from them would prove meaningful.

The resulting solicitations, though automated, appear to come from the campus partners' personal email accounts. They invoke common experiences and, in some instances, solicit alumni for gifts to restricted funds.

The messaging and designations in these appeals align with alumni's "hidden affinities" that advancement staff would otherwise overlook.

Problems Addressed

When advancement staff attempt to identify micro-affinities in the alumni community, they quickly encounter a problem of reach. Central staff can glean only small amounts of information from the alumni records to which they have access.

Even if advancement staff correctly identify an alumnus/a's particular affinity, sending an appeal from the central annual giving office would not draw enough attention to inspire action.

Alumni can easily ignore appeals from the institution as a whole, since they incur no social cost for doing so, and stand to gain no social reward in exchange for action.

Diagnostic Questions

1. Do alumni at your institution typically respond to appeals from an individual on campus (e.g., president, dean, coach) at higher rates than to institutional or generic annual giving appeals?
      ____Yes   ____No

2. Can advancement staff identify faculty and staff members who would willingly provide a list of prospective donors with whom they maintain connections?
      ____Yes   ____No

3. Would those campus partners be willing to send an email solicitation to those alumni?
      ____Yes   ____No

4. Do advancement staff have capacity to collaborate with campus partners to draft multiple appeal versions?
      ____Yes   ____No

5. Does your institution struggle to identify and leverage alumni affinities for fundraising success?
      ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize affinity giving campus collaborations.

Institutions Profiled

Texas Christian University
- Institutional control: Private
- Enrollment: 10,300 (8,900 undergraduate)
- Carnegie classification: Doctoral Universities (Higher Research Activity)
- Campus setting: Large city (Fort Worth, TX)

University of Vermont
- Institutional control: Public
- Enrollment: 12,800 (11,000 undergraduate)
- Carnegie classification: Doctoral Universities (Higher Research Activity)
- Campus setting: Small city (Burlington, VT)

Segment Alumni by Campus Relationship

Faculty and Staff Ambassadors Make a Personalized Case for Giving Back

Texas Christian University Taps into Wide-Ranging Alumni Communities

Excerpted Campaign List

Ambassador	Alumni Group	Audience Size
"Nature of Giving" Professor	Course Participants	64 alumni
Director of First Year Experience	Orientation Camp Leaders	263 alumni
Rhinoceros Researcher	Environmental Science Majors	123 alumni
Chemistry Department Chair	Chemistry Majors	208 alumni
Leadership Center Director	Leadership Development Program Participants	71 alumni

Solicitations Emphasize a Cause That Alumni Can Relate To

Plain-Text Email from Personal Connection

Dear Haley,

As the fall semester comes to a close, we are gearing up for the spring semester, and I am excited to once again teach the Nature of Giving and Philanthropy class to another group of honors students, **just as I taught you**. Every year this course gains in both reputation and prestige, and this is a direct result of the quality of your work as a student in the course.

As someone who participated in my class, you know better than most how important philanthropic support is to a nonprofit institution. TCU relies on alumni like you to make a gift and continue the TCU legacy for many generations to come. TCU needs your support now. You can make a gift at www.makeagift.tcu.edu.

Texas Christian University enfranchises campus partners through its ambassador-driven outreach initiative.

During the initiative, a diverse group of campus partners, ranging from a philosophy professor to the leadership center director, help annual giving staff

identify a target group of young alumni and craft a solicitation that the group would find meaningful.

Fund designations vary by solicitation and include both unrestricted and restricted options, depending on the appeal.

Source: Texas Christian University, Fort Worth, TX.; Advancement Forum interviews and analysis.

eab.com

An Authentic Appeal to Alumni Affinities

Right Message and Right Messenger Resonates with Young Alumni

Highly Targeted Solicitations

"These emails go through our email system, and they're written and approved by us. But they look like they came from a faculty or staff member from across the university. They are highly targeted and very specific. Open rates for these emails have been through the roof."

Harmonie Farrow
Director of Loyalty Giving
Texas Christian University

An Unprecedented Response[1]

400x Higher response rate than for typical young alumni email campaigns

25% Of solicitation recipients gave a gift

100% Of donors graduated in the last 10 years

The initiative offers a fantastic example of personalization at scale. Although much of the work of crafting and sending the appeal occurs centrally, each solicitation appears wholly customized to each individual alumnus/a.

This high-touch approach brings high engagement from young alumni, who open the emails in record numbers. It also converts many of these alumni into donors. In its first year, the appeal saw a giving rate that was 400 times higher than the institution's typical young-alumni appeals.

---

1) Data for 2016 initiative unavailable. Results based on smaller 2015 pilot.

Source: Advancement Forum interviews and analysis.

Surface High-Potential Fundraising Projects

Affinity Group Partnerships Target Nuanced Alumni Segments

Old Model	New Model
One-Size-Fits-All Unrestricted Asks	**Targeted Affinity Fundraising**

Old Model

- 8-10 campaigns a year
- Solicitations asked for unrestricted dollars
- Alumni segmented exclusively by giving history

New Model

- 50+ campaigns a year
- 75% of solicitations ask for restricted dollars
- **Alumni segmented by campaign-specific variables, including affinity**

Segmentation Criteria

Sustainability Appeal

- Email listserv
- Former student interns
- Student eco-reps
- Environmental science majors

2,280 Recipients

LGBTQA Campaign

- Newsletter recipients
- Local community advocates
- Students who participate in center activities

648 Recipients

Student Club Project

- Current parents
- Past parents who have given to student clubs
- Alumni with student clubs coded on record

13,724 Recipients

The University of Vermont has also worked closely with campus partners to personalize appeals for alumni affinities, interests, and demographics.

Previously, the university conducted a small number of broad outreach campaigns every year. These efforts brought declining returns as alumni interest gravitated away from unrestricted institutional support.

In response, advancement leaders at Vermont reoriented annual giving efforts to focus primarily on restricted funds on campus. They now conduct over 50 targeted campaigns every year, soliciting alumni for everything from sustainability efforts on campus, to the LGBTQA center, to support for specific student clubs.

Source: Advancement Forum interviews and analysis.

Collaboration Is Key to Affinity Outreach

Annual Giving Staff Share Campaign Workload with Fundraising Groups

A Collaborative Enterprise

Annual Giving Handles Mechanics

- Appeal logistics (deadlines, printing)
- Copywriting best practices
- Solicitation templates
- Alumni data

Campus Partner Adds Reach and Relevance

- Prospect lists and contact information
- Appeal content and case for support
- Social media promotion
- Personal network solicitations

Key Steps to Launching Affinity Campaigns *EAB Recommendations*
✓   **Identify campus partners** willing to participate in fundraising
✓   **Determine which alumni segments** each project could appeal to
✓   **Prioritize projects** based on breadth of relevance and diversity of appeal
✓   **Assign roles** and responsibilities to campus partners and establish deadlines
✓   **Develop creative** materials for multichannel or digital appeals
✓   After campaign, **assess results** and record lessons-learned for future solicitations

Unsurprisingly, executing 50 campaigns annually involves quite a bit of work. Central advancement is not alone in this endeavor.

While advancement staff coordinate many of the logistical, data, and copywriting needs, campus partners contribute to the effort, too. Staff and faculty members review prospect lists to ensure the university is targeting the right individuals, help craft the case for support, and promote the campaigns on social media.
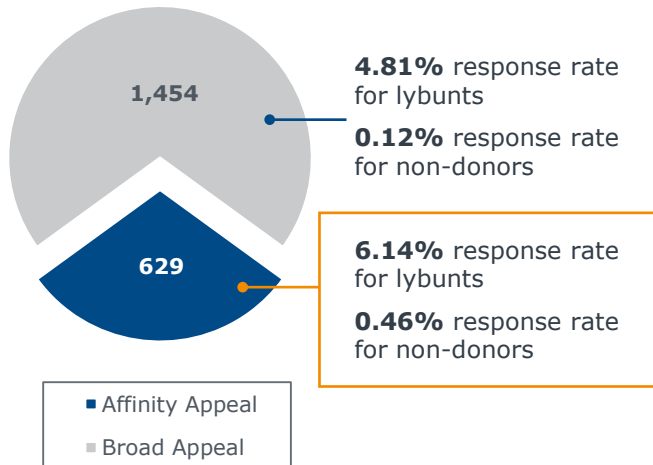
Advancement leaders who would like to launch their own segmented affinity campaigns should review the above EAB guidance.

Source: Advancement Forum interviews and analysis.

Affinity Giving Acquires Donors

Recent Graduates and Non-donors Respond to Highly Targeted Appeals

Affinity Projects Claim a Growing Share of Giving

Snapshot of Direct Mail Donors, 2015

1,454

629

- ■ Affinity Appeal
- ▪ Broad Appeal

4.81% response rate for lybunts

0.12% response rate for non-donors

6.14% response rate for lybunts

0.46% response rate for non-donors

Young Alumni Response Rate

0.6% Affinity appeal mailing

0.4% Broad appeal mailing

" Percentage-wise, we almost always see a better response when we're **putting something in front of our non-donors that feels personal to them**, as opposed to a generic pitch to give back."

Kevin Morgenstein Fuerst
Senior Director of Annual Giving
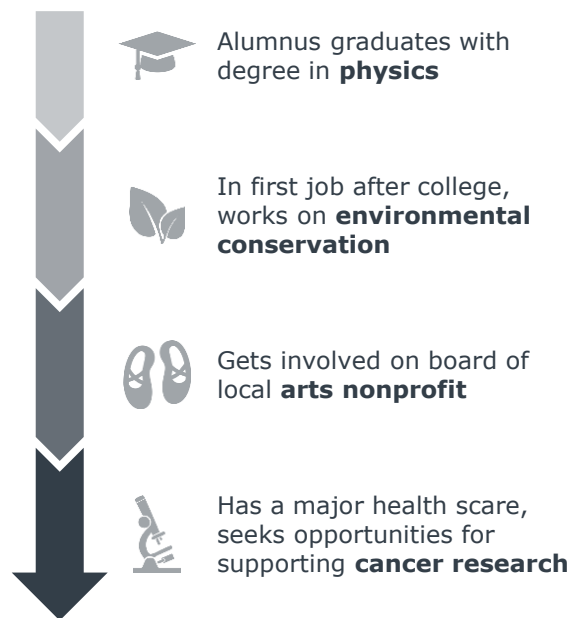*University of Vermont*

The University of Vermont's affinity projects boosted response rates for both lybunts and non-donors. It also did particularly well with young alumni, improving upon the typical response rate by half.

Advancement leaders at Vermont attribute the strategy's success to its personal touch. Donors, they say, respond best when the appeal feels targeted to their interests at the institution.

Source: Advancement Forum interviews and analysis.

Evolving Affinities Complicate Outreach

Only Alumni Can Truly Say What Will Motivate Them to Give

Alumni Affinity Shifts and Grows

Alumnus graduates with degree in **physics**

In first job after college, works on **environmental conservation**

Gets involved on board of local **arts nonprofit**

Has a major health scare, seeks opportunities for supporting **cancer research**

Hard to Predict Where Alumni Will Give

Fundraising Results from a Large Research University

49% Of college of engineering graduates gave to another school or college

77% Of college of arts and sciences graduates gave to another school or college

A Lack of Affinity Intel

❝ I had an alumnus call me up and say, 'I want to give to the music program—can I do that?' I was baffled. Turns out he was a college of business graduate. All we'd ever done was solicit him for business. We'd never asked him for the thing he cared about—heck, **we didn't even have a clue what he cared about**."

Annual Giving Director
Private Research University

Engaging with the unique passions of each alumnus/a can boost response rates. Yet often the advancement office has little information on where those passions lie.

Alumni affinities evolve after graduation. Life experiences expose alumni to new ways to give back and new causes that deserve their support.

University solicitation strategies rarely keep up. In most cases, advancement staff continue soliciting alumni for a particular designation long after their interests move on.

Source: Advancement Forum interviews and analysis.

Practice 13: Cause-Oriented Giving Pages

Put Donors in the Driver's Seat

Practice in Brief

Advancement and IT staff overhaul the institution's giving page to better guide donors to the cause that motivates them to give.

The new layout groups gift designations by their overarching cause or theme. Designations sit side by side regardless of their home department or college.

User-friendly layouts present website visitors with cause photos, customized cases for support, progress bars, and other multimedia elements that elevate the giving experience and help sustain momentum through the completion of the gift.

Problems Addressed

Advancement staff struggle to identify which gift designations best align with alumni affinities. Whatever information they may have on donor interests quickly grows out of date as donors develop new philanthropic interests.

As a result, staff cannot proactively reach out to donors with suggestions about giving options that they would find meaningful.

In addition, donors who visit the giving page encounter difficulties when trying to find those meaningful causes for themselves. The university buries specific gift designations in long drop-down menus that few donors go through the trouble of navigating.

Consequently, donors fail to see something they feel passionate about supporting. They ultimately leave without making a gift.

Diagnostic Questions

1. Does your giving page use a drop-down menu for gift designations?
   ____Yes   ____No

2. Does annual giving solicit alumni primarily for gifts to their college or department?
   ____Yes   ____No

3. Does advancement lack up-to-date information on the current philanthropic interests of alumni?
   ____Yes   ____No

4. Does advancement struggle to identify which areas of campus motivate which groups of alumni to give?
   ____Yes   ____No

5. Can IT staff support a website overhaul?
   ____Yes   ____No

If you answered "Yes" more times than "No," you may wish to prioritize cause-oriented giving pages.

Institutions Profiled

University of California, Los Angeles
- Institutional control: Public
- Enrollment: 41,900 (21,600 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Large city (Los Angeles, CA)

Colorado State University
- Institutional control: Public
- Enrollment: 30,600 (23,900 undergraduate)
- Carnegie classification: Doctoral Universities (Highest Research Activity)
- Campus setting: Midsized city (Fort Collins, CO)

Let Alumni Choose What Resonates

Organizing Allocations by Impact Category Guides Alumni to Their Passion

UCLA's Road Map of Causes
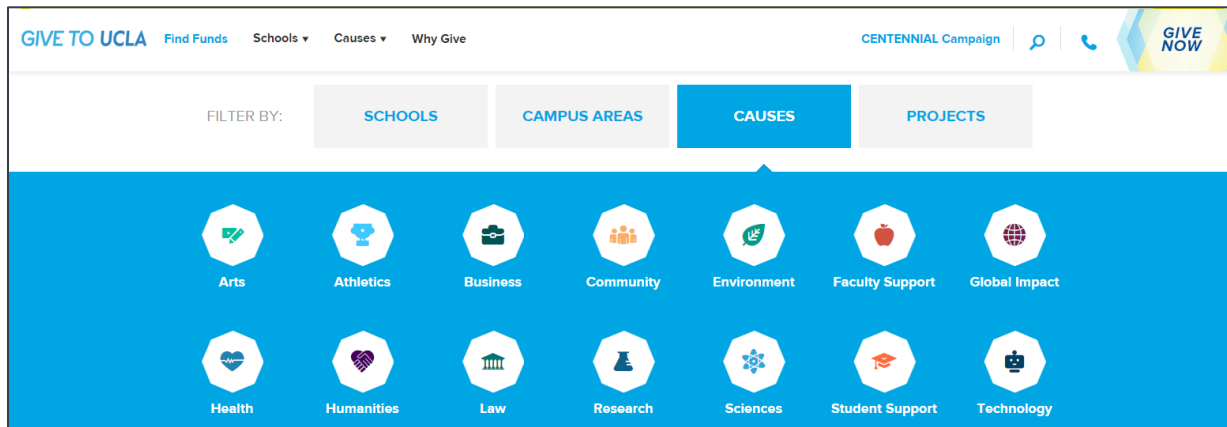
Funds Curated from Across Campus

Research: Congenital heart disease center; wildlife preservation; undergraduate research

Global Impact: Arts and global health; infectious diseases in Haiti; student fieldwork support

Technology: Nanosystems institute; diversity in engineering; aging and longevity research

The University of California, Los Angeles (UCLA) overcame the challenge of constantly evolving alumni affinities by empowering alumni to find the cause that most resonates with them. By putting alumni in the driver seat, they circumvented the perennial problem of misaligned appeals.

UCLA's new giving website allows alumni to browse through a range of funds from all across campus.

Instead of the traditional drop-down list of designations, they have organized funds by "cause."

The website lists 14 causes, ranging from the arts, to the environment, to technology, to global impact. Alumni who click on any one of those causes will see a diverse group of funds from all across campus to which they can donate.

Beyond a Static List of Designations

User-Friendly Giving Interface Reminiscent of Crowdfunding Platform

UCLA Optimizes Online Donor Experience
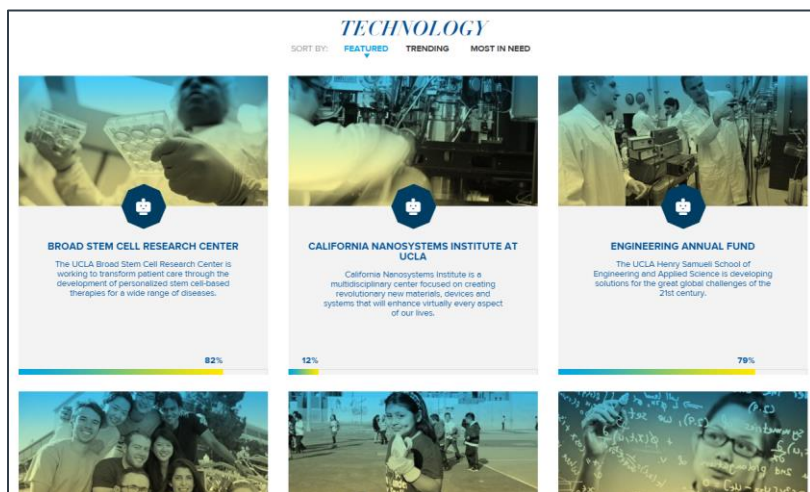
Key Elements

1. Images feature prominently on fund pages

2. Progress bars increase transparency for donors

3. Most funds have customized cases for support

> **Our site is designed to help a donor find what matters most to them.** A philanthropic investment is not about money, it is about impact. It is a donor's investment into something they believe in and we as an institution must strive to be their greatest facilitator, whether online or face to face."
>
> *Gary Stevens, Director of Digital Strategy*
> *UCLA*

These funds appear in an attractive, user-friendly format. In many ways, the website's layout mirrors the functionality of crowdfunding. Photographs illustrate each case for support, a progress bar tracks donations, and alumni who hover over the fund can see its total fundraising goal.

Advancement leaders at UCLA hope to use the website to connect donors to causes that they care about on campus.

A Diagnostic for Alumni Affinities

"Find Your Purpose" Web Quiz Points Alumni to Funds That Will Inspire

Alumni Answer Quick, Fun Questions

1 Choose a quote that best describes your life philosophy

2 What's your ideal weekend activity?

3 Where would you like to visit most on campus?

Quiz Assigns Alumni a Giving Persona

The Builder   The Connector   The Healer

The Explorer   The Creator   The Nurturer

Persona Mapped to Suggested Funds

THE HEALER

Your mind was designed to connect science with compassion, constantly on a mission to mend, soothe, revive, and renew. Whether it's medicine, health, or the environment, quality of life and ensuring that for others is of top priority to you.

ALWAYS REMEMBER NEVER SURRENDER SCHOLARSHIP ENDOWMENT: TAKE A STAND AGAINST SUICIDE
Provide support for the Always Remember Never Surrender Scholarship Endowment in the College of Natural...

CROPS FOR HEALTH: FEED THE WORLD
Propel research and education that seeks solutions for better food crops to benefit humans across...

CVMBS SCHOLARSHIP ENDOWMENT
Make an impact on the next generation of veterinarians, doctors, and scientists.

MARCHING BAND ENHANCEMENT: BAND TOGETHER
Support the award-winning CSU Marching Band – our green-and-gold heartbeat.

NEW START FOR DISTINGUISHED VETERANS: SERVE THOSE WHO HAVE SERVED
Honor our veterans with support and hope of a brighter future at Colorado State University.

SAVE THE ELEPHANTS: STOP THE IVORY TRADE
More than 25,000 elephants are killed for their ivory each year. Poaching is far outpacing...

Colorado State University has gone one step further in guiding alumni to causes by building an alumni persona web quiz into their giving page.

The quiz assigns one of six giving personas to alumni. The personas map to funds on campus that stretch across divisional silos. For example, a "healer" could browse a fund to combat the ivory trade in Africa and save elephants, a fund to support future veterinarians and doctors, and a fund for an anti-suicide scholarship endowment.

eab.com

90

Coda: Annual Giving 2026

A Profession Evolves

A Glimpse of the Future

Marketing Automation Dominates Commercial Industry

Marketing Automation in Practice

1 Firm builds out customer profiles based on behavioral data

2 Developers program content streams that are individualized for each profile

3 Customer actions activate content stream

4 Customer automatically receives personalized communications

The Rise of a Must-Have Tool

Vendor Revenue, 2009-2015

Year	Revenue
2009	$100M
2010	$225M
2011	$325M
2012	$500M
2013	$750M
2014	$1.2B
2015	$1.65B
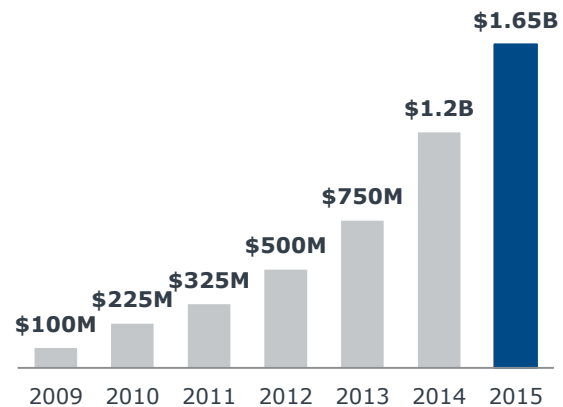
$5.5B In acquisitions from 2010 to 2015 (outpacing vendor revenue three times over)

49% Of businesses currently use marketing automation to manage customer relationships

Annual giving has changed rapidly in response to technological shifts. To understand where the field is going, one must look outside of higher education.

Commercial industry's recent embrace of marketing automation hints at coming changes in the world of university fundraising. Marketing automation streamlines and, as the name would imply, automates marketing tasks and workflows. It personalizes outreach to customers and potential customers based on their interests and what they engage with online.

Marketing automation has evolved from a nice-to-have to a need-to-have tool in six short years. By some accounts, half of all commercial enterprises now use marketing automation tools to manage their customer and client relationships.

A New Playbook for Annual Giving

Philanthropic and Commercial Worlds Converge in Outreach Strategies

From Old-School Fundraising... → **...To the Frontiers of Marketing**

Rigidly scheduled outreach

Appeals sent at regular, predictable times of year

Trigger-based appeals

Digital microbehaviors spark automatic follow-up

Segments based on giving history

All alumni who give similarly get the same appeals

Nuanced, psychographic segments

Alumni grouped based on passions, interests, and behaviors

Single-channel or lightly multichannel outreach

Channels operate independently of one another

Omni-channel campaigns

All channels, including full range of digital, used to deliver appeal

Separation of engagement and gift appeals

Engagement content planned without considering gift asks

Integrated content marketing and appeals

Engagement serves to "warm" prospect pool and surface leads

Signs have begun to appear that the spirit of marketing automation is migrating to higher education. Advancement leaders increasingly express a desire to adapt the "old-school" annual giving playbook to the needs and wants of today's alumni.

Some institutions have even sought to partner with marketing automation providers to achieve this goal. The University of Chicago and Rutgers University, for example, recently signed on with Marketo, one of the bigger vendors, to help transform outreach strategy.

They hope that doing so will yield them long-term gains in alumni participation, engagement, and ultimately major giving. Alumni today have come to expect that organizations will communicate with them as unique individuals about topics and causes that they hold dear. Advancement leaders who meet these expectations will win not just mindshare, but the loyalty of a new generation of supporters as well.

Source: Advancement Forum interviews and analysis.

EAB

Donor Mindshare Toolkit

Accelerating Implementation on Campus

SECTION

6

- Online Giving Page Audit
- Donor Drop-Off Follow-Up Scripting
- Digital Micro-campaign Planning Guide
- Common Denominator Cause Identifier
- Social Media Engagement Organizer
- Cause Curation Template

Online Giving Page Audit

Prospective donors leave the giving page at high rates when they encounter frustrating interfaces. The online donation process must be as smooth as possible to maximize conversion rates.

Use the below audit to determine how best to streamline your giving page.

Identify Unnecessary Giving Page Fields

In the table below, list the information fields your giving page asks donors to fill out. To identify which fields you can safely remove, choose whether each one is "nice" or "need" to have. Select how negative an impact removing the field would be (e.g., removing the "name" field would likely be high, as you would not be able to identify donors, while removing "business address" would be low).

(Note: Giving page conversion rates drop off precipitously after 15 fields.)

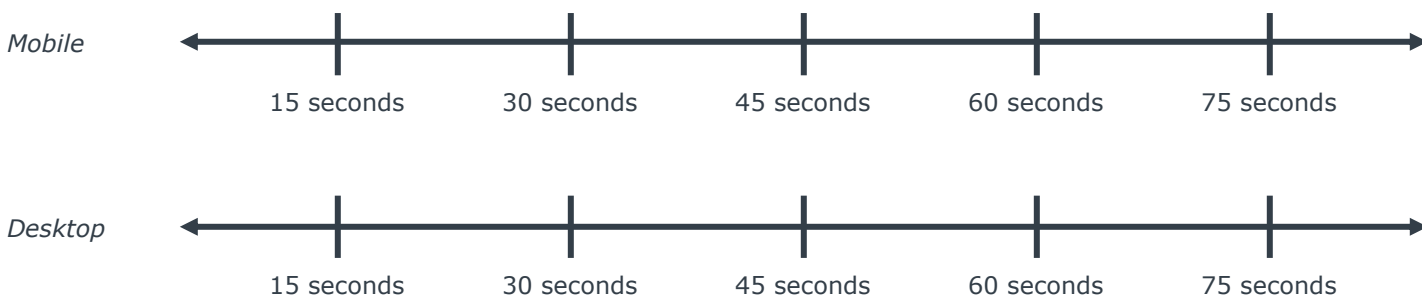| Information Field Name	Nice to Have or Need to Have?		Negative Consequences of Removing It?		
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High
	Nice	Need	Low	Medium	High

Online Giving Page Audit (cont.)

Calibrate Time to Checkout

To benchmark your giving page's current performance, open it on your mobile device and on a desktop computer. (You should navigate to the page that opens when you click on "Give Now" on your advancement website.)

Fill out all of your information (including your credit card number), but do not hit submit. Keep track of how long it takes you to complete all of the information fields from the moment you first open the page.

Repeat the process with four of your peer institutions' giving pages to evaluate how you compare. Mark below how long it takes to complete your institution's giving page with a dark circle. Use the numbers 1 through 4 to indicate how your peers performed.

Mobile

15 seconds	30 seconds	45 seconds	60 seconds	75 seconds

Desktop

15 seconds	30 seconds	45 seconds	60 seconds	75 seconds

Evaluate Giving Page Replacements

Countless vendors offer streamlined giving pages that expedite checkout and boost conversion rates. Use the table below to organize your notes on the providers that your institution is evaluating.

Vendor Name	What do you like about their page?	What do you dislike about their page?	How easy would implementation be?

Donor Drop-Off Follow-Up Scripting

Life is hectic, and donors often get distracted midway through making a gift. An urgent email could come in, or they could forget where they put their credit card, or their baby could start crying—the possible disruptions are endless. Regardless of the cause of the distraction, advancement staff must make every effort to reengage these drop-off donors and bring in their donations.

The scripting below provides examples that advancement staff can use for email follow-up, as well as possible subject lines.

Scripting Option 1

Hello [NAME],

Thank you for your recent visit to the [INSTITUTION] giving page! We noticed that you started a gift but something must have happened along the way. If you submitted your gift online already, please disregard this email. Otherwise, please give me a call at [NUMBER] with questions or visit [GIVING PAGE URL] to complete the giving form!

Your gifts make it possible for the college to continue to deliver a world-class education for today's students. Thank you for your past support. Our current fiscal year ends on [END DATE OF FISCAL YEAR]. I hope to hear from you!

Very best,

[NAME]

Scripting Option 2

[NAME],

We appreciate that you recently checked out [INSTITUTION]'s giving page. It looks like you may not have filled out all your information. Would you still be interested in making a gift?

If so, you can give online at [GIVING PAGE URL]. You can also give by phone—feel free to call me directly at [NUMBER].

Donors like you provide support for students and make [INSTITUTION] an excellent school. Thank you for all you've done for us and for our students.

Sincerely,

[NAME]

Possible Subject Lines

The giving form	Make your gift soon	A quick follow-up
Following up on your visit	Did you leave something behind?	I wanted to ask…
Complete your gift today	We'd appreciate your support	Leaving so soon?
Making sure you don't forget	Giving back	Wrapping up the donation

Digital Micro-campaign Planning Guide

One-off solicitations have seen declining returns in recent years. Donors may see the appeal, but a single touch doesn't do enough to cut through the noise and remind a donor to give.

Advancement leaders have turned to digital micro-campaigns to compete for awareness among their donors. Digital micro-campaigns involve sending a short burst of multiple solicitations through various digital channels in a bounded time frame.

Use the planning guide below to set up and execute on your own digital micro-campaign.

Pick a Time Frame

There are two approaches to choosing a time frame:

1. Find a slow time of year when the micro-campaign doesn't have to compete for attention with other institutional outreach and events.

2. Find a busy time of year when alumni and donors are most likely to already be thinking of the institution.

Advancement leaders have seen success opting for both approaches—for example, in February when other outreach from the institution is at a lull; and at the end of December, when donor attention is divided but attuned to philanthropic appeals.

In the table below, select whether the given month qualifies as "slow" or "busy" for donors, and list out any events or outreach from the institution that would compete for attention.

	January	February	March	April	May	June
Busy or Slow?	Busy Slow	Busy Slow	Busy Slow	Busy Slow	Busy Slow	Busy Slow
Competing Outreach/ Events?						

	July	August	September	October	November	December
Busy or Slow?	Busy Slow	Busy Slow	Busy Slow	Busy Slow	Busy Slow	Busy Slow
Competing Outreach/ Events?						

Digital Micro-campaign Planning Guide (cont.)

Select an Audience

Digital micro-campaigns can work to acquire and renew a diverse range of donors. In the space below, check the boxes next to the audiences you would like to segment for your upcoming micro-campaign.

Giving History

☐ Current-year donors (second gift) ☐ Lybunts ☐ Sybunts ☐ Never-givers

☐ Annual fund donors (<$1,000/year) ☐ Annual leadership donors ($1,000-$25,000/year) ☐ Less lifetime giving (<$10,000 total) ☐ More lifetime giving (>$10,000 total)

Demographics

☐ Millennial alumni ☐ Gen X alumni ☐ Women alumni ☐ Alumni of color

☐ LGBTQ alumni and allies ☐ Local alumni ☐ Parents ☐ Legacy alumni

Engagement Level

☐ Recently engaged (past 1-2 years) ☐ Lapsed engaged (3-5 years) ☐ Long-lapsed engaged (6+ years) ☐ Never engaged

Engagement Type

☐ Online engagers ☐ Reginal event attendees ☐ Campus event attendees ☐ Alumni volunteers

Choose a Theme

To inspire the groups you selected above to give, you must choose the right theme. Use the prompts below to brainstorm micro-campaign themes that will resonate with these donor prospects.

Micro-campaign theme 1: _____

Which groups will find this theme most inspiring? _____

Describe the case for support in one sentence: _____

_____

_____

Digital Micro-campaign Planning Guide (cont.)

Micro-campaign theme 2: _____

Which groups will find this theme most inspiring? _____

Describe the case for support in one sentence: _____

_____

_____

Micro-campaign theme 3: _____

Which groups will find this theme most inspiring? _____

Describe the case for support in one sentence: _____

_____

_____

Develop a Multichannel Plan

Micro-campaigns are most effective when multiple fundraising channels reinforce the ask. Use the below table to coordinate fundraising appeals through a variety of complementary channels.

Email

Subject Line	Summary of Appeal Text	Send Date/Time	Donors/Dollars (Post-Campaign)

Digital Micro-campaign Planning Guide (cont.)

Social Media

Overall Theme	Content of Post	Social Media Platform	Post Date/Time	Likes/Comments/ Clickthroughs (Post-Campaign)

Text Message (Optional)

Message Scripting	Send Date/Time	Clickthroughs (Post-Campaign)

Common Denominator Cause Identifier

Donors give at higher rates when fundraising appeals explain the specific impact their gifts will have on campus. The solicitation can ask for unrestricted dollars as long as it's accompanied by a detailed description of some concrete ways the funds will be used.

Circulate the below questions to department leaders to identify high-passion projects and "common denominator" causes that advancement staff should highlight in appeals.

Questionnaire Template

What projects are you and your colleagues working on that donors should know about? _____

_____

What are some specific ways that you and your colleagues will put donors' dollars to use? _____

_____

What new departmental projects have your alumni been most excited about? _____

_____

What programs and services that you and your colleagues administer have the biggest impact on your students?

_____

Social Media Engagement Organizer

Advancement staff can gather clues about what causes and funds to craft appeals around by analyzing social media engagement data. Likes and comments offer indications of which themes resonate strongly with your alumni community. They also may reveal which appeals would have the greatest effect on non-donors, young alumni, and other priority populations.

Identify Priority Populations

In the fields below, list three populations that you struggle to acquire or retain. You will assess your social media data with an eye to how well your posts perform with these populations.

Priority Population #1: _____

Priority Population #2: _____

Priority Population #3: _____

Analyze Social Media Data

Post Date/Time	Social Media Platform	Likes/Shares/ Clickthroughs for Priority Population #1	Likes/Shares/ Clickthroughs for Priority Population #2	Likes/Shares/ Clickthroughs for Priority Population #3

Cause Curation Template

Organizing funds by cause instead of organizational unit can lead non-donors to a giving opportunity that would inspire them to start supporting your institution.

In the fields below, list fund designations or areas of campus that would align with each top-line cause.

Arts: _____

_____

_____

Business: _____

_____

_____

Community: _____

_____

_____

Environment: _____

_____

_____

Global Impact: _____

_____

_____

Cause Curation Template (cont.)

Health: _____

_____

_____

Humanities: _____

_____

_____

Research: _____

_____

_____

Sciences: _____

_____

_____

Technology: _____

_____

_____

Advisors to Our Work

Advisors to Our Work

The Advancement Forum is grateful to the individuals and organizations that shared their insights, analysis, and time with us. We would especially like to recognize the following individuals for being particularly generous with their time and expertise.

Boise State University
Cara Walker
Senior Director,
Annual Giving

Boston College
Israel Kloss
Web Designer/ Developer,
Advancement Communications
and Marketing

Susan Ramsey
Executive Director of Alumni and
Parent Giving

Andria Silva
Director, Marketing
and Participation

Brown University
Christy Law Blanchard
Director of Program Outreach and
Development, Pembroke Center
for Teaching and Research
on Women

Carnegie Mellon University
Mary Ann McCollough
Director of Annual Giving

Christa Papcunik
Associate Director of
Annual Giving

**Case Western
Reserve University**
John Templeman
Director of Annual Giving

Clemson University
Brian O'Rourke
Vice President, Development and
Alumni Relations

College of William and Mary
Daniel Frezza
Assistant Vice President for
Lifetime Philanthropic
Engagement and
Annual Giving

Matthew Lambert
Vice President for
University Advancement

Chantel Smith
Director of Direct Marketing and
University Development

Colorado State University
Meg Weber
Executive Director of Annual
Giving and Donor Relations

Cornell University
Keith Hannon
Associate Director, Digital
Innovation, Office of
Alumni Affairs

Matt Siegel
Senior Director, Cornell
Annual Fund

Dickinson College
Ali Frohman
Associate Director of the
Dickinson Fund

**Dominican University
of California**
Virginia Gray
Director of Annual Giving

Drexel University
Ivy Lane
Director of Strategy and
Analytics, Drexel Fund

Elizabethtown College
David Beidleman
Vice President for Institutional
Advancement and
Community Relations

Liz Braungard
Executive Director of Marketing
and Communications

Benjamin Osterhout
Senior Associate Director of
Annual Giving

Rachel Vandernick
Web Content and Social
Media Manager

Emory University
Benjamin Tompkins
Associate Vice President,
Development

Georgetown University
Parker Johnson
Data Analyst,
Annual Giving

Joannah Pickett
Assistant Vice President,
Annual Giving

Gettysburg College
Paul Redfern
Executive Director of
Communications and Marketing

GiveCampus
Kestrel Linder
Chief Executive Officer
and Co-Founder

**Grenzebach, Glier
and Associates**
Andrew Shaindlin
Vice President

Johns Hopkins University
Chris Dax
Director of Annual Giving

**Kutztown University
of Pennsylvania**
Alex Ogeka
Senior Director of Development
and Alumni Relations, Kutztown
University Foundation

Lehigh University
Chad Davis
Senior Director,
Lehigh Fund

Doug Ebersole
Director of Lehigh Fund Special
Programs and Participation

Longwood University
Ryan Catherwood
Assistant Vice President for
Alumni Relations

Kristina Easter
Director of Development for
Annual Programs

Loyola University Maryland
Terrence Sawyer
Vice President, Advancement

**Massachusetts Institute
of Technology**
Meredith Gulley
Assistant Director,
E-marketing

D. Timothy Poisson
Interim Senior Director of
Communications, Director of
Annual Fund Marketing
and Participation

Sean Riley
Director, Web Marketing—MIT
Annual Fund

Guy Schoonmaker
Assistant Director,
New Media

Christine Tempesta
Senior Director, Information
Systems and Volunteer Services

McGill University
Paul Chesser
Assistant Vice-Principal,
Development

Miami University
Brad Bundy
Senior Associate Vice President
and Campaign Director

Middlebury College
John Coburn
Assistant Director of the
Annual Fund

**Missouri University of Science
and Technology**
Katie Jackson
Assistant Director of
Alumni Relations

Janice Ridolfi
Assistant Director of
Annual Giving

Muhlenberg College
Heather Lavin
Associate Director of
Communications, Office
of Advancement

North Central College
Adrian Aldrich
Executive Director of
Development and
Alumni Affairs

Northern Kentucky University
Eric Gentry
Vice President for
University Advancement

Northwestern University
Elizabeth Sullivan
Executive Director of
Annual Giving

Oberlin College
Marissa Evans
Assistant Director of Alumni
Relations

Ma'ayan Plaut
Manager of Social Strategy
and Projects

Oklahoma State University
Amanda Davis
Associate Vice President of
Annual Giving

Optoro
Nick Kramer
Manager, Client Success

Oregon State University
Lacie LaRue
Senior Director of Annual
Giving Programs

Pennsylvania State University
Geoff Hallett
Assistant Director, Office of
Annual Giving

Point Park University
Greta Daniels
Director of Annual Giving

Sarah Myksin
Director of
Alumni Relations

QuadWrangle
Nick Zecketts
Founder and Chief
Executive Officer

Rice University
Margot Davis
Associate Director for Direct
Marketing and Participation,
Rice Annual Fund

Emily Hilber
Director, Rice Annual Fund

Roger Williams University
Lisa Raiola
Vice President of
Institutional Advancement

**Rutgers, The State University
of New Jersey**
Gina Fiorillo
Director of Annual Giving

Thomas Hammond
Associate Vice President for
Alumni Relations

Nevin Kessler
President, Rutgers University
Foundation and Executive Vice
President, Development and
Alumni Relations

Barbara Turman
Former Associate Vice President
of Annual Giving

**Saint Mary's College
of California**
Melissa Young
Senior Associate Director of
Annual Giving

Samford University
Randy Pittman
Vice President for
University Advancement

Santa Clara University
Ron Song
Senior Director, Prospect
Management and Analytics

**Silverpop,
An IBM Company**
Mark Coleman
Strategic Sales Manager

Smith College
Katie Averill
Assistant Director,
The Smith Fund

**Southwestern Adventist
University**
Rachel Denny
Director of Development

Stanford University
Amy Wilson
Director, The Stanford Fund and
Direct Marketing

**Stevens Institute
of Technology**
Melissa Fuest
Assistant Vice President, Alumni
Engagement and Annual Giving

Brodie Remington
Vice President for Development

Temple University
Kathryn Amrhein
Development Associate and
Manager, OwlCrowd

Texas Christian University
Harmonie Farrow
Director of Annual Giving

**The George Washington
University**
Matt Lindsay
Senior Executive Director, Digital
Strategy and Engagement

Lauren Walinsky Savoy
Senior Director, Development and
Alumni Communications

Rebecca Trump
Executive Director,
Annual Giving

Teads.tv
Cameron Skinner
Account Executive

Tufts University
Sean Devendorf
Senior Director of
Annual Giving

University of Arizona
Stephanie Balzer
Director of Communications,
University of Arizona Foundation
(Former)

University of Calgary
Nuvyn Peters
Vice President (Development)

**University of California,
Berkeley**
Laurent De Janvry
Director of Annual Giving, Haas
School of Business

**University of California,
Los Angeles**
Mike Gyulai
Executive Director,
Annual Giving

Jarrett Oakley
Director, UCLA Spark

Gary Stevens
Directory of
Digital Strategy

**University of California,
San Diego**
Meredith Blair
Executive Director, Regional
Advancement and Annual Giving

University of Chicago
Lori Hurvitz
Senior Director of
Annual Giving

Paul Leo
Director of Direct Response

University of Connecticut
Lauren Grabowski
Assistant Director of
Annual Giving

Karen LaMalva
Director of Annual Giving

Brian Otis
Vice President for Development

University of Florida
Heather Duiser
Associate Director of the
Florida Fund

Elizabeth Keppel
Associate Director of
Annual Giving

University of Louisville
Ann Coffey
Chief of Staff to the Associate
Vice President for Advancement

Diana Dicus
Assistant to the Vice President for
University Advancement

Josh Hawkins
Chief Operating Officer, Associate
Vice President's Office, Alumni
Relations and Annual Giving

Keith Inman,
Vice President for
University Advancement

University of Miami
Taylor Stayton
Development Director,
Annual Giving

University of Michigan
Megan Doud
Senior Director of
Annual Giving

Linda Douglas
Senior Director of Marketing and
Annual Giving

Katherine Kowalski
Associate Marketing Director

University of Mississippi
Angie Avery
Annual Giving Coordinator

Suzanne Thigpen
Director of
Annual Giving (Former)

University of Missouri, Columbia
Ryan Coleman
Coordinator of Marketing and Coordination, Mizzou Alumni Association

University of North Carolina at Charlotte
Niles Sorensen
Vice Chancellor for Advancement

University of North Carolina System
Timothy Minor
Vice President for University Advancement

Rachael Walker
Prospect Development Manager

University of North Florida
Paul Prewitt
Associate Director of Annual Giving

University of Pittsburgh
Albert J. Novak, Jr.
Vice Chancellor for Institutional Advancement

University of Rochester
Eric Loomis
Associate Vice President of Administrative Services

University of San Francisco
Michael Pasqua
Director of Development Services

Martin Scherstuhl
Director of Annual Giving

University of Saskatchewan
Kathy Arney
Interim Vice President, Advancement and Community Engagement

University of Southern California
Iyoni Rice
Director of University Annual Giving

University of Tennessee, Knoxville
Lance Taylor
Associate Director of Campaign

University of Texas at San Antonio
Marjie French
Vice President for External Relations and Chief Development Officer

Genevieve Tobias
Director of Annual Giving

Jessica Wojda
Assistant Director of Annual Giving

University of Toronto
Kimberly Lyn
Digital Editor and Online Community Manager

Heather Ullman
Executive Director, Annual and Leadership Giving

University of Vermont
Rich Bundy
Chief Executive Officer and President, University of Vermont Foundation

Kevin Morgenstein Fuerst
Director of Annual Giving

University of Virginia
Patrick Stanley
Manager for Digital Strategy and HoosNetwork, Office of Engagement

University of Washington
Walt Dryfoos
Associate Vice President for Advancement Services

Susan Hayes McQueen
Senior Director, Prospect Management, Research and Analytics

Wake Forest Baptist Medical Center
Robert J. Gfeller, Jr.
Executive Vice President, External Relations and Chief Marketing Officer

Wake Forest University
Blake Absher
Executive Director of the Wake Forest Fund

Hayes Henderson
Assistant Vice President, Creative Communications

Bart Rippen
Director of Creative Communications

Tim Snyder
Associate Vice President, Alumni and Donor Services

Washburn University of Topeka
JuliAnn Mazachek
President, Washburn University Foundation

Washington State University
Mark Hermanson
Executive Associate Vice President, University Advancement Operations and Campaigns

Williams College
Laura Day
Director of Annual Giving

Xavier University of Louisiana
Lacrecia James
Annual Fund Manager